

Collaboration Process Worksheets



The SCO Worksheets



1A. Internal Alignment Summary

2A. Partner Alignment Summary

3A. Communication Map Assessment

3B. Collaboration Opportunities Summary

4A. Initiative Plan

4B. Initiative Scorecard

5A. Initiative Review Meeting Agenda

1A: Internal Alignment Summary



Internal Objectives of SCO Partnership	
<ul style="list-style-type: none"> • X • X • X 	
Team: Lead / Support	Resources Required / Available
Internal Deliverables	Internal Key Milestones
<ul style="list-style-type: none"> • X 	<ul style="list-style-type: none"> • X
<ul style="list-style-type: none"> • X 	<ul style="list-style-type: none"> • X
<ul style="list-style-type: none"> • X 	<ul style="list-style-type: none"> • X

2A: Partner Alignment Summary



Partnership Objectives of SCO Partnership	
<ul style="list-style-type: none"> • X • X • X 	
Team: Lead / Support	Resources Assigned
Joint Deliverables	Key Milestones
<ul style="list-style-type: none"> • X 	<ul style="list-style-type: none"> • X
<ul style="list-style-type: none"> • X 	<ul style="list-style-type: none"> • X
<ul style="list-style-type: none"> • X 	<ul style="list-style-type: none"> • X

3A: Communication Map Assessment



Success Factor	Assessment	Details
Location Master Data		
Item Master Data		
Inventory Levels		
Lead Time		
Capacity		
Shipment Data P.O.		
Item Forecast		
POS		

3B: Collaboration Opportunities Summary



Key Take-Aways / Insights

Implications for SCO Collaboration

Communication Flow

- XX

- XX

Data Sharing

- XX

- XX

Process Integration

- XX

- XX

Resources & Tools

- XX

- XX

4A: Initiative Plan



Initiative Name		Initiative Description	
Objectives		Risks / Exceptions	
Efficiencies			
Cost savings			
Team Member		Responsibility	
Tactical Plan			
Tactic / Description		Owner	Key Dates

4B: Initiative Scorecard



Initiative Name:				
Leading / Lagging	Key Measures	Goal	Actual (Through XX/XX)	Status
Leading Measures of Activity				
Lagging Measures of Outputs				

5A: Initiative Review Meeting Agenda



Learning Based on Scorecard Results	Short-Term Initiative Related	Long-Term Relationship Impact
	Initiative Adjustment Recommendations	Implications to Relationship – New Opportunities & Areas of Leverageable Value
XX	XX	XX