

Implementation Plan (30/60/90)

Rollout checklist, workstreams and deliverables

Purpose: Provide a structured rollout plan after award to ensure governance, data readiness and operational stability from day 1.

0. Setup

- Confirm awarded scope, lanes, rates, accessorials and governance rules (signed addenda).
- Nominate owners per workstream and confirm escalation paths.
- Freeze master data: shipper addresses, incoterms, packaging, DG profiles, temperature profiles.
- Confirm systems and access: portals, EDI/API credentials, user roles, reporting cadence.

1. Workstreams and owners

Workstream	Owner (Shipper)	Owner (Provider)
Commercial & contracts	[Name]	[Name]
Operations & SOPs	[Name]	[Name]
IT / EDI / API / visibility	[Name]	[Name]
Customs & compliance	[Name]	[Name]
Finance / billing	[Name]	[Name]

2. 30/60/90-day rollout checklist

Use the table below as the baseline rollout plan. Add or remove tasks depending on your scope and maturity.

Phase	Task	Deliverable	Owner	Due date
Day 0–30	Kick-off meeting and governance set-up	Kick-off minutes; RACI; escalation tree	[Shipper/Provider]	[DD MMM]
Day 0–30	Data validation (lane list, volumes, DG/temp profiles)	Validated lane list + assumptions log	[Shipper]	[DD MMM]
Day 0–30	SOP alignment (pickup, cut-offs, documentation)	Approved SOP pack	[Provider]	[DD MMM]
Day 0–30	IT onboarding (portal / EDI / API) and event mapping	Connectivity test report; milestones mapping	[IT]	[DD MMM]
Day 0–30	Finance set-up (billing format, invoice checks)	Invoice template; dispute workflow	[Finance]	[DD MMM]
Day 31–60	Pilot shipments on critical lanes	Pilot results; corrective actions	[Ops]	[DD MMM]
Day 31–60	Claims process	Claims SOP; SLA	[Provider]	[DD MMM]

	rehearsal / escalation test	confirmation		
Day 31–60	Compliance check (filings, customs brokers, DG)	Compliance sign-off	<i>[Compliance]</i>	<i>[DD MMM]</i>
Day 61–90	Scale-up to full awarded scope	Go-live sign-off	<i>[RFQ Owner]</i>	<i>[DD MMM]</i>
Day 61–90	KPI baseline and first dashboard	KPI dashboard v1	<i>[Ops/BI]</i>	<i>[DD MMM]</i>
Day 61–90	First QBR preparation and agenda	QBR pack	<i>[RFQ Owner]</i>	<i>[DD MMM]</i>
Day 61–90	Post-implementation review	Lessons learned + action plan	<i>[All]</i>	<i>[DD MMM]</i>

3. Operating cadence (after go-live)

- Weekly operational call (first 8–12 weeks): exceptions, service issues, backlog, corrective actions.
- Monthly performance review: KPI trends, root causes, corrective/preventive actions.
- Quarterly Business Review (QBR): strategic alignment, network changes, cost drivers, roadmap.