

Deal name:

Deal owner & deal team members:

Partner:

Executive summary

- Deal rationale: *why are we doing this deal? What do we aim to achieve?*
- Partner's deal rationale: *why is the partner doing this deal? what are their objectives / priorities?*
- Success metrics & timeline: *how will success be measured? When? Please provide details if partner is focused on different metrics than we are.*

Terms and Key Negotiation points

- Include a brief summary of any non-standard deal terms
- Key negotiation points

Financial model

- Summary: *how is the deal structured? expected investments? estimated returns? key assumptions?*
- *Please provide a link to financial model that includes key assumptions*

Approvals

- Legal: approved or not yet?
- Finance: approved or not yet?

Post deal performance

- Who is accountable for the success of this deal?
- What's the method that will be used for tracking this?
- Is there a plan for the team to come back and present to leadership?

Legal review

Please provide any non-standard terms or redlines to our standard agreement

Contract section	Non-standard term	Rationale	Mitigation

Cross-functional feedback

Deal owner is responsible for collecting input from cross-functional stakeholders prior to deal review.

Team	Stakeholder feedback <i>(please add a blurb with your support, dependencies, concerns, etc. and the date)</i>
Product	
Eng	
Marketing	
Legal	
Finance	
Other	