



CVM Planning – Exit Management (Strategy & Planning)

Two pronged issue:

1. Contract Management - Exit Management (EM)

- Contract
 - *T&C's – ensure that the Terms and Conditions within the Contract are explicit in terms of any assistance the incumbent supplier will give the new supplier should the service be transitioning over*
 - *Obligations – ensure early attention given to production of EM Plan and forms part of the tracked obligations, then ensure all obligations are regularly tracked*
- *Firm Governance – ensure EM is included in Monthly Governance Meetings and/or additional periodic EM Forums to make. This may take the form of an agenda item for each meeting until an agreed draft has been produced*
- *Hold Supplier to account – make it clear that there is a firm onus on the Supplier for the production of the EM Plan and Strategy and make sure that all actions are recorded in respective forum and are carried out in a timely manner to ensure EM isn't something that is 'glossed over' and left to the 11th hour of the Contract Lifecycle*
- *Correctly Resourced – ensure that the Businesses are aware of the upcoming Exit and if transitioning to another Supplier(s), there is a Project Manager (PM) appointed especially if the service will transition from either one supplier to many or many suppliers to one.*



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2. Timely Notification of Contract Expiry Date

- Count-back from expiry/Exit Date – *make sure that there is a diarised date for a timely flag (say 12 – 15 months prior to expiry) to notify the business of potential contract/service expiry. However, this is dependant on the Supplier, Size/Complexity of Service and whether the service is part of a Tower.*
- Notification to Procurement – *upon the timely expiry flag, notify Procurement of the potential expiry. This will then give them plenty of opportunity to get an appetite from the business for future state service and factor any requirement into any new procurement. This will enable a new Supplier to be ready to be chosen at least 6 months before expiry and ensure any transition of service is timely (if new supplier).*

NB – *this activity will also have the effect of focussing the incumbent Suppliers minds and thinking about how, potentially, they will retain Post Office business i.e. frame some deals for POL.*

- Add to Risk Register – *once 12 months before expiry, include on Risk Register to ensure Senior visibility and action*



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What ingredients does a good Exit Management Plan or Strategy have to have?

- **Data Access** – *being able to access the relevant data to execute the EM Plan and/or for Service Transition*
- **Resource Requirements** – *to carry out the plan/strategy and/or Service Transition incl. Roles & responsibilities*
- **End Point Payments Agreed** – *all costs and charges agreed prior to plan finalisation including what is chargeable*
- **Service Transition Timings** – *Project Plan agreed tasks etc.*
- **Agreed Workstreams** – *IT, H/W, S/W, Security, Asset Management, Communications etc.*
- **Phases & Governance** – *including Scope agreed*
- **Risk, Issues & Assumptions**