

Earn the Right to Banks Readiness Map

Pairs with: Earn the right to banks

Decide whether a bank conversation is learning, sales, partnership, or distraction.

Founder / team	Account / market / topic	Date
-----------------------	---------------------------------	-------------

When to use it

Use this before treating a bank conversation as a real sales opportunity.

What this worksheet covers

Current proof	Stakeholders
Evidence gaps	Procurement path
Sponsor strength	Readiness rating

Questions to answer before you start

What proof do you already have outside the bank?

Who owns the business problem inside the bank?

What would fail vendor review today?

What is the path from learning to paid pilot?

Are you ready to enter the bank process, or should this stay as learning?

Bank readiness map

Area	Current position	Gap	Next action
Revenue proof	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Relevant references	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Security and data evidence	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Operational resilience	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Implementation plan	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Internal sponsor	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Budget owner	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Procurement path	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Exit criteria	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

Readiness rating

Rating	Meaning	Your evidence
Red	_____	_____
Learning only. No clear route to budget or evidence pack is weak.	_____	_____
Amber	_____	_____
Potential opportunity. Key gaps still need closing.	_____	_____
Green	_____	_____
Ready to pursue. Sponsor, budget path, proof, and evidence are clear.	_____	_____

Risks, gaps, and evidence needed

Risk or gap	Why it matters	Evidence or action needed	Owner/date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review
