



Mind the Gap

Designing Clean Handoffs Between
Acquisitions, Licensing, and Selectors

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M LIBRARY



Who owns the middle space?

“I want this” → “Stable access + signed license”



● What you'll leave with



- A quick way to diagnose gaps
- A starter framework to design handoffs
- 3 templates: intake / handoff packet / decision record

Two-part activity: Ownership Pulse → Map the Gap



No moving, just fingers + a 3-step mini-map

Role key



1 Selector | 2 Acq

3 Licensing/ERM | 4 Shared/Depends

Pulse prompts 1–4



- 1 Intake
- 2 Trial setup
- 3 Usage/feedback
- 4 Quote/pricing

Pulse prompts 5–8



- 5 License review
- 6 Order/commit funds
- 7 Activation
- 8 Record of decision



Map the Gap

In 3 steps, sketch just the slice around your gap.

Your chosen step: _____ (e.g., #5 License review, #2 Trial setup, #8 Record of decision)

Before	Pain point	After
Before Who has it / what happens first?	<i>Where does it break down most often?</i>	<i>What should happen next?</i>
Inputs / Handoff What info or context needs to move?	<i>What's usually missing or messy?</i>	<i>What would a clean handoff include?</i>
Next Who should get it / what's the trigger?	<i>What causes delays or confusion?</i>	<i>What's the "next signal" or owner?</i>

04:00

- 
- Ownership ambiguity?
 - Missing inputs?
 - Where is this recorded?
- 



Definition

Handoff = work changes hands +
context must travel



Lifecycle at 10,000 feet

Select →

Evaluate →

Commit →

License/Enable →

Sustain



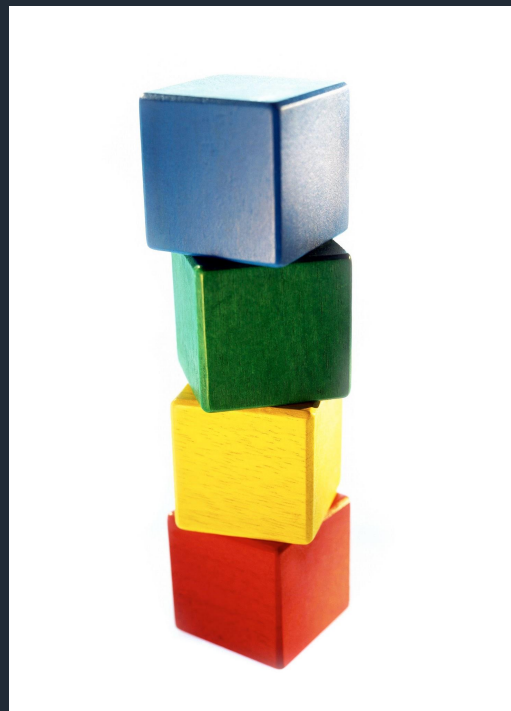
Failure modes



- Ownership ambiguity
- Missing inputs
- No “next signal”
- No durable record

4 building blocks

- Stage clarity (who owns what when)
- Standard intake paths (by request type)
- MVP handoff packet (checklist)
- Decision record (durable + findable)



Building block 1: Stage clarity



Stage → Primary owner → Backup / Consulted

Building block 2: Standard intake paths

Trial | One-off | Package/Big deal | Renewal

Each box gets only:

- Trigger (1 line)
- Minimum info (3 bullets)
- Where it enters (ticket/form/queue)



Building block 3: handoff packet

If it isn't in the packet, it
doesn't move.



Building block 4: Routing rules

Example:

- License required → route to Licensing
- Trial → evaluation notes required before quote request
- Renewal → decision record updated before vendor response

Decision record



Resource (Alma title)

Title / Collection / Portfolio name



Type

Trial / One-off / Package / Renewal



Requester & Stakeholders

Selector; key partners



Workflow Owner

Acquisitions / Licensing / Other (shared)



Decision Date

(and fiscal year, if relevant)



Funding

Fund name(s) / FY / PO or encumbrance



License & Access (Alma/ERM)

License status; enrollment; coverage; activation notes



Rationale & Source of Truth

Why approved; link to ERM record / document location



Next Review / Renewal

Date; trigger; owner

Mini case study (Before → After)



Renewal Environment

- 5,000+ renewals
- \$18.7M spent | \$6.16M encumbered
- 200+ manual renewals

Constraints

- Licenses: 2–3 months
- Multiple systems
- Multiple units

Selectors → Order Unit → Licensing



Arrivals ↔ Metadata



ERM/Access



Outages



Finance



Maybe notified | ? Who owns this |  Loops


What we'd do differently next time





Clarity is a kindness.





What gap did you map?

Q&A

