

Mutual Plan Letter and Timeline Example

Dear Ms. Pearson,

Thank you for taking the time to meet with me on Monday. I enjoyed meeting you and appreciate your candor in sharing some of the challenges you are currently facing, the changes you are looking to implement, and most importantly, the results you are looking to achieve. I look forward to working with you to make those results a reality.

The purpose of this note is to summarize our conversation, and have it serve as a starting point for creating expectations moving forward. Please feel free to make any edits or additions to ensure accuracy.

The primary challenge you face is to eliminate the hassle of commercial travel and not have to be limited by a charter service. **[BUSINESS ISSUE]**

To achieve this, you need to address the following: **[PROBLEMS]**

-
-

You mentioned several solutions that you considering in overcoming these challenges: **[SOLUTIONS]**

-
-

The impact of these solutions on you and your business included: **[VALUE]**

-
-

You indicated that we should expand your assessment activities to include **[POWER]** and a number of other functional supporters as well. From our discussion, I have outlined a preliminary plan to accomplish this and included target dates for your review. These activities will culminate with a term sheet review presentation to you, **[POWER]**, and the other members of the task team on March 15.

[PLAN]

The completion of the attached list of activities is designed to enable you to determine whether entering into a partnership with [Your Company] is the best way to help you resolve these business issues and achieve your objectives.

Sincerely,

Sales Representative



Event	Date	Owner	Is it completed?
Discovery	08/01	Rep	Yes
Discussions with Team	10/01	Joint	Yes
Trial Activities	01/17	Joint	Yes
Develop Conversion Plan	01/21	Rep	
Power Update	01/24*	Joint	
Customer Purchase Order	01/23	Customer	
Implementation Plan	01/26*	Rep	
Go Live	02/03	Joint	
Benchmark Meeting	03//30	Joint	
Business Issue Resolved	04/15	Joint	
Value Realized	04/15	Joint	

* At these points, we will confirm our findings show we are matching visions on each of your business issues and we are in agreement our approach will enable you to resolve them. In addition, we will be confirming the value is sufficient to warrant SkyLabs becoming a customer of XYZ Inc.