



Practice Activity

Example of a Mutual Plan

Objective:

To refer to an example of a Mutual Plan.

Instructions:

1. Go through the example of a Mutual Plan included here.
2. Refer to it when creating a Mutual Plan.

Mutual Plan Example: Email Template

Hi [Ms. Business Owner],

I really enjoyed our conversation on Monday, and I appreciate you taking the time to share the challenges you're facing and the goals you're working towards. I'm excited about the opportunity to help you achieve the results you seek.

I wanted to send this quick summary of our discussion to keep us both on the same page. Feel free to make any changes or add anything I may have missed.

Your main challenge:

You're looking to eliminate the hassle of commercial travel and have more control over your schedule without relying on a charter service. [Business Issue/Personal Objective]

What you're working on:

To tackle this, you mentioned needing to address the following:

- [PROBLEM 1]
- [PROBLEM 2]

Solutions you're considering:

We also talked about a few potential solutions, including:

- [SOLUTION 1]
- [SOLUTION 2]

How these solutions could benefit you:

You mentioned that these changes would have the following impact on your business:

- [VALUE 1]
- [VALUE 2]

You also suggested we loop in [POWER] and some other key people to help with the decision-making process. I've put together a rough timeline for how we can move forward and hit our target dates, including a final review with you, [POWER], and your team on March 15th.

Next Steps and Timeline:

The list below includes the main activities we discussed along with target dates. The goal is to make sure you have all the information you need to decide if partnering with [Your Company] is the best way to meet your goals.

Event	Date	Owner	Completed?
Discovery	08/01	Rep	Yes
Discussions with Team	10/01	Joint	Yes
Customer Purchase Order/Contract signed	01/23	Customer	
Implementation Plan	01/26*	Rep	
Go Live	02/03	Joint	
Value Realized	04/15	Joint	

I am looking forward to continuing the conversation and helping you achieve your goals!

Best,

[Your Name]

When you're ready, return to the e-learning module to continue your learning journey.