

Practice Activity

Generate a Mutual Plan



Objective:

To generate a Mutual Plan using the ValuePrompter®.

Instructions:

1. Follow the instructions related to creating a Mutual Plan included here.
2. Create the Mutual Plan in your ValuePrompter®.

Steps for Creating a Mutual Plan Letter from the ValuePrompter®

1. Organize Information from the ValuePrompter®:

- Start by reviewing the key sections of your ValuePrompter®: Business Issue, Problem, Solution, Value, Power, and Plan.
- Confirm that you've captured the buyer's language, and the information is accurate based on your conversations.

2. Begin the Letter with a Summary:

- Open the letter by thanking the prospect for their time and confirming your understanding of the key points discussed.
- Example: "Thanks again for chatting with me today. Here's a quick recap of what we discussed—feel free to adjust or add anything I may have missed."

3. State the Business Issue:

- Clearly outline the high-level business challenge that the customer is trying to solve. Use the prospect's own words to demonstrate active listening.
- Example: "You mentioned that your biggest challenge right now is finding ways to free up time and streamline your business so you can focus on growing it."

4. Outline the Problems:

- List the key problems that are preventing the prospect from solving their Business Issue. This reinforces the challenges they face and sets the stage for your proposed solution.
- Example: "To do that, we'd need to solve handling too many manual tasks, improving customer communication, and reducing time spent on admin work."

5. Summarize the Solution:

- Describe the specific solutions that were discussed. Include the solutions you offer and how they address the problems.
- Example: "We discussed implementing a customer management tool to automate those manual tasks, improve communication with your customers, and cut down on your admin workload."

6. Connect to Value:

- Link the solution to the measurable business value it will provide to the prospect. Show how your solution impacts their bottom line, using quantifiable metrics if possible.
- Example: "With this setup, you could save around 10 hours a week, which means more time to focus on growing the business and improving your customer experience."

7. List Key Stakeholders (Power):

- Identify the decision-makers or influencers who will be involved in the purchasing decision. This is crucial to ensure the plan has the right people involved for approval.

- Example: “We talked about looping in your business partner, [Partner’s Name], to finalize the details and make sure everything is good to go.”

8. Define the Next Steps and Timeline:

- Outline the mutual next steps and include a timeline that both you and the customer have agreed upon. Each step should be clear and linked to the value the customer expects to realize.
- Example: “Next steps: We’ll get the trial set up by [Date], review the progress by [Date], and look to fully implement by [Date].”

9. Use the Reverse Timeline:

- Begin with the end goal—value realization for the buyer—and work backward to today. Ensure the plan doesn’t just stop at purchase or implementation but focuses on when the buyer will see measurable results.
- Example: “Here’s a timeline of how we get from setup to success. We’ll start with the trial setup, then implementation, and you should start seeing real results by [Date].”

10. Close with Collaboration:

- Reinforce that this is a collaborative plan and invite the customer to make changes if needed. This emphasizes that the plan is co-created and mutual.
- Example: “I’m excited to get this moving and work together on making this happen. Let me know if we need to tweak anything along the way!”

Template Example:

Subject: Summary and Next Steps for Improving Operational Efficiency

Dear [Customer Name],

I really enjoyed our meeting today and appreciate you sharing the challenges you're working through. Below is a quick recap of what we talked about, along with the steps we discussed to get things rolling. Feel free to make any edits or suggestions!

Business Issue: You're looking to improve how things run day-to-day so you can spend less time managing the back end and more time growing the business.

Problems:

- Streamlining your order processing
- Fixing communication gaps with your team
- Reducing the manual tasks slowing things down

Proposed Solution: We talked about setting up an all-in-one management tool that will handle orders, help with team communication, and automate repetitive tasks so you can focus on what matters.

Expected Value: With this setup, you could save at least 10 hours a week and reduce errors, which will let you focus on growing your business instead of chasing down details.

Key Stakeholders:

- You
- [Name of business partner, if any]

Next Steps and Timeline:

- Set up trial run: [Date]
- Review progress and make adjustments: [Date]
- Full setup completed: [Date]
- See results by: [Date]

Let me know if this sounds good, or if we need to adjust anything. I'm looking forward to making this work for you!

Best,
[Your Name]

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