

Create a Mutual Action Plan (MAP)

Before You Start:

Confirm the opportunity is worth pursuing:



Outcome fit: The customer agrees your approach can deliver a specific business outcome.



Impact: Expected results are clear and, when possible, quantified.



Decision Access: You know who makes the call and who influences it.



Plan Readiness: The customer is open to documenting next steps in writing.

The 7 Steps

Step 1: Capture customer language in your notes.

Write down the desired outcome, current challenges, success metrics, key stakeholders, and early next steps using the customer's words.

Step 2: Draft a one-paragraph summary.

Thank them and confirm outcome, expected impact, and target timing. Don't introduce new info.

Step 3: Define the end state (value realized).

State the result that matters to the customer, e.g., "*Cut onboarding time 30% by March 31.*" The plan ends at value realized, not at contract.

Step 4: Build a reverse timeline.

Work backward from value realized to today. List milestones with owners and dates for evaluation, commercial review, implementation, enablement, measurement, and a business review.

Step 5: Assign owners.

For each milestone, name the owner: Customer, You, or Joint. Include decision makers and cross-functional partners.

Step 6: Bridge activities to outcomes.

Use simple "*this means... as a result...*" statements that connect actions to the results the customer cares about. Keep it concise and scannable.

Step 7: Send the Mutual Action Plan for edits.

Share the summary and timeline, invite changes, and get written confirmation. Treat it as a living doc and update after every meeting.

MAP Messaging Template

Subject: Summary & Mutual Plan for [Outcome]

Desired outcome: ...

Challenges to address: ...

Why this approach fits: ...

**Expected impact &
how we'll measure it: ...**

Key stakeholders: ...

**Reverse timeline to
value realized:**

- Value realized: [Date] — KPI: ... (Owner: Joint)
- Go-live: [Date] (Owner: Joint)
- Evaluation complete: [Date] (Owner: Customer)
- Trial or proof activity: [Date] (Owner: Joint)
- Today → kickoff prep: [Date] (Owner: You)

Negotiables / assumptions: ...

*"If this reflects the plan, I'll keep it updated
and resend after each checkpoint.
What would you change?"*

Quality Check Before Sending

- **Mutual:** Nothing new — it confirms what you already discussed
- **Customer-centric:** Ends at value realized, not at signature
- **Specific:** Dates, owners, KPIs are explicit
- **Readable:** Short, scannable, mobile-friendly
- **Outcome-linked:** Activities clearly lead to results
- **Accountable:** Next meeting scheduled, plan updated in writing



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