

SCALE

The Mutual Action Plan (MAP)

September , 2024

Mutual Action Plan (MAP) Tool

What it is

A one-page plan (sometimes called a 'MAP', 'Mutual Success Plan' or a 'Close Plan') built collaboratively by sellers and buyers that outlines the key steps required to move forward with a deal or project

Who it's for

Sellers, sales leaders, and buyers

Why it's important

Mutual action plans:

- Accelerate deal cycles and prevent lengthy times-to-close
Deals often get delayed when they go to Legal and InfoSec. Setting timelines early using a MAP can help the process
- Qualify buyer intent and urgency
A buyer's willingness to build and execute a MAP shows strong intent. Conversely, a lack of willingness is an early warning sign
- Highlight the need to meet with senior executives / decision makers
- Increase conversion rates

Best Practices: Mutual Action Plans that convert leverage the following



Collaborative approach

Build the MAP *with* a buyer, particularly to address Legal, InfoSec, and Procurement requirements



Early sales stage introduction

Introduce the MAP after an initial demo instead of waiting until the proposal stage

Work backwards

Start with the buyer's go-live date and work backwards



Timeline with limited steps

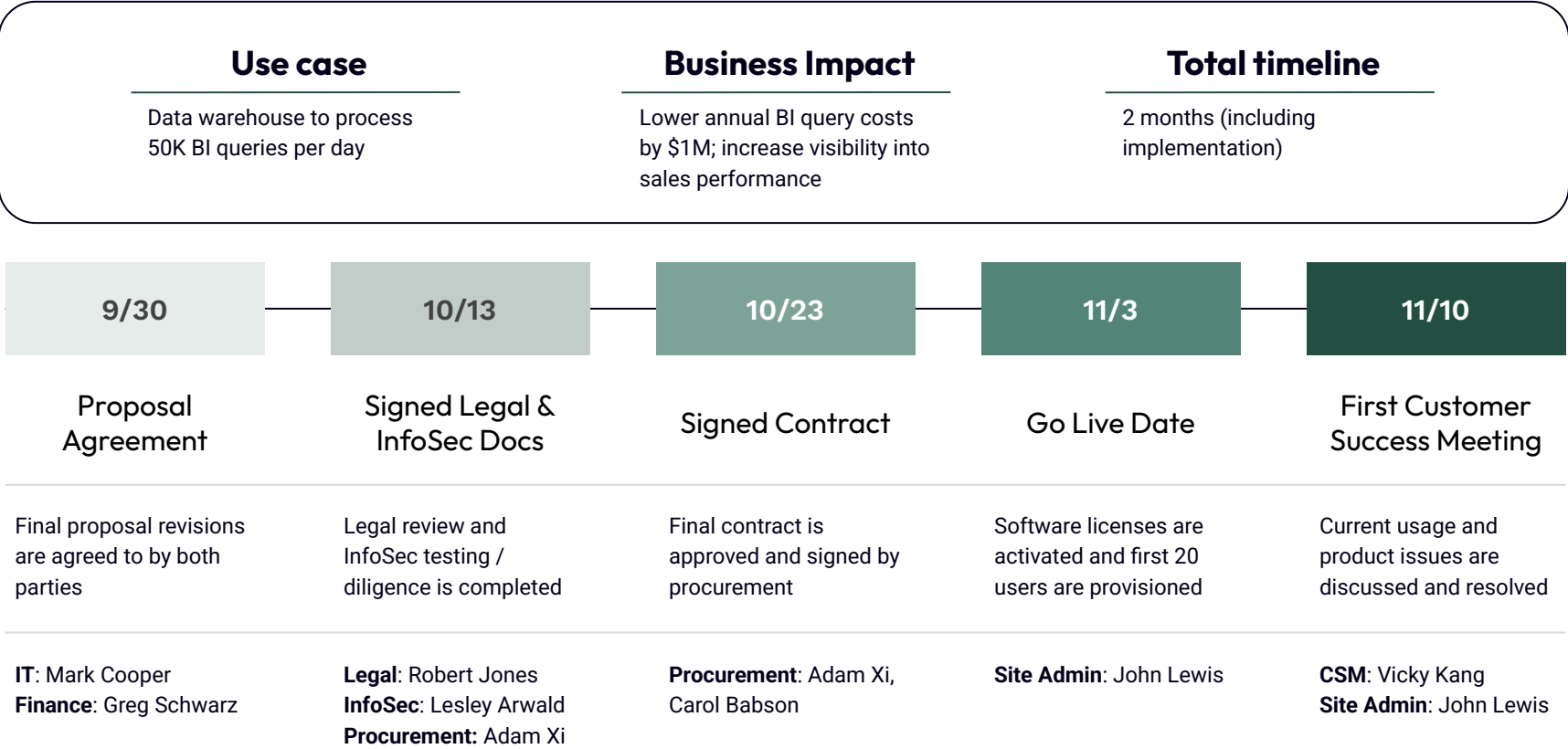
Keep it simple and focus on no more than 5 key steps. For larger clients, leverage a visual map on a single slide. For smaller clients or single-threaded buying processes, a simple list in an email will suffice



Verbal and written buyer confirmation

Getting the buyer's verbal or written confirmation on Final MAPs can increase conversion rates by as much as 50%

MAP Example #1



MAP Blank Template #1

| <div><div><div>Use case</div><div>Description</div></div><div><div>Business Impact</div><div>Description</div></div><div><div>Total timeline</div><div>Description</div></div></div> | | | | |
|--|--|--|--|--|
| <div>Due Date</div> <div>Milestone Name</div> <div>Description</div> <div>Owner Department: Owner Name</div> | <div>Due Date</div> <div>Milestone Name</div> <div>Description</div> <div>Owner Department: Owner Name</div> | <div>Due Date</div> <div>Milestone Name</div> <div>Description</div> <div>Owner Department: Owner Name</div> | <div>Due Date</div> <div>Milestone Name</div> <div>Description</div> <div>Owner Department: Owner Name</div> | <div>Due Date</div> <div>Milestone Name</div> <div>Description</div> <div>Owner Department: Owner Name</div> |

MAP Blank Template #2

| Project Overview | | |
|------------------|-----------------------------|-------------|
| Proposal Summary | Proposed Solution | Description |
| | Project Scope | Description |
| Benefits Summary | Critical Business Objective | Description |
| | Key Benefits | Description |
| Key Stakeholders | Decision Makers | Names |
| | Legal, Procurement | Names |

| Path Forward / Next Steps | | | | |
|---------------------------|-----------|-------|--------|-------|
| Due Date | Milestone | Owner | Status | Notes |
| Date | Milestone | Owner | Status | Note |
| Date | Milestone | Owner | Status | Note |
| Date | Milestone | Owner | Status | Note |
| Date | Milestone | Owner | Status | Note |

MAP for Single-Threaded Processes

For single-threaded buying processes (i.e., a 1- or 2-person buying committee) with smaller ACVs (less than \$50,000), it is standard to just send the key elements of the MAP in an email

[illegible]