SCALE

The Mutual Action Plan (MAP)

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 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



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



Early sales stage introduction

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



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%



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

MAP Example #1

Finance: Greg Schwarz

InfoSec: Lesley Arwald

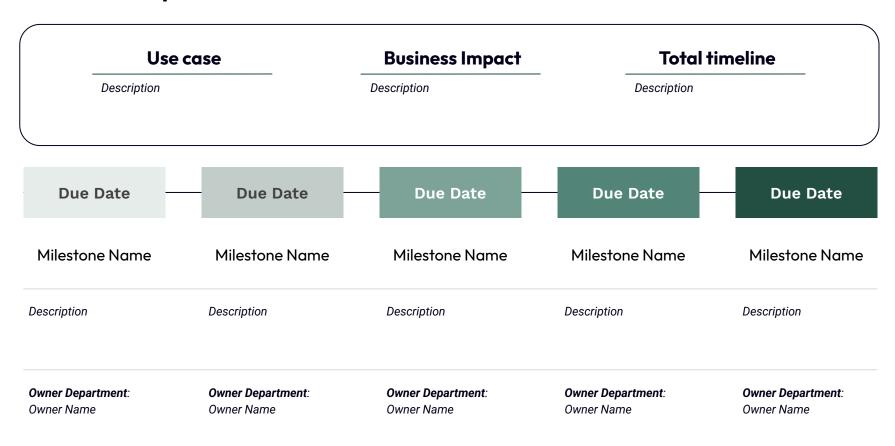
Procurement: Adam Xi

Total timeline Use case **Business Impact** Data warehouse to process Lower annual BI query costs 2 months (including 50K BI queries per day by \$1M; increase visibility into implementation) sales performance 9/30 10/13 10/23 11/3 11/10 First Customer Proposal Signed Legal & Signed Contract Go Live Date InfoSec Docs Agreement Success Meeting Final proposal revisions Legal review and Final contract is Software licenses are Current usage and are agreed to by both InfoSec testing / approved and signed by activated and first 20 product issues are diligence is completed discussed and resolved parties procurement users are provisioned IT: Mark Cooper Legal: Robert Jones Procurement: Adam Xi. Site Admin: John Lewis CSM: Vicky Kang

Carol Babson

Site Admin: John Lewis

MAP Blank Template #1



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

