

MAP TEMPLATE FOR DE-RISKING DEALS

Driving Expansion Strategy in FY23

MUTUAL ACTION PLAN AT RISK

AUG SEP OCT NOV DEC

1 2 0 3

MILESTONE	STATUS	DATES
Priorities & Capabilities	DONE	■■■■
Proof of Value	DONE	■■■■
Pilot	DRAFT	■■■■
Vendor of Choice	OVERDUE	■■■●■
Internal Contact Prep	ON TRACK	■■■■
Commercials	ON TRACK	■■■■

Vendor of Choice
OVERDUE

3

4 Files & Resources

ACTIONS

-
-
-
-
-

COMMENTS

■■■■

ABOUT THIS MAP TEMPLATE

A mutual action plan documents the collaboration between a buying team and the selling team to achieve milestones and work towards a signature. Mutual action plans ensure your entire revenue team is in lockstep with the extended buying team, de-risking the deal for your buyer while driving best-in-class sales execution and **more predictable revenue**.

HOW TO USE THIS MUTUAL ACTION PLAN TEMPLATE

Make a copy of this template, then customize for every deal in your pipeline. There are three keys to successful MAPs:

- 01** | Co-create it with your buyer so they have “skin in the game”
- 02** | Be consistent! If you make this a habit, it will become second nature, improving your performance along the way
- 03** | Hold yourself — and your buyers — accountable to each step. Skipping or missing steps leads to chasing bad deals and missed forecasts. Neither are good for hitting quota

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ACTIONS

COMMENTS

[Download your editable MAP Template here](#)

MUTUAL ACTION PLAN: COMPANY FOR COMPANY

[Jump to team members](#)

[Value Prop Summary]

Value prop description [30-40 words].

OVERALL STATUS

ON TRACK

Target Start Date	03/06/23
Go live (Calculated)	06/12/23
Days to Go Live (Calculated)	98

MILESTONES

	DAYS	START	END	OWNER	OWNER
ON TRACK Priorities & Capabilities	3	03/06/23	03/09/23	TEAM MEMBER ▾	TEAM MEMBER ▾
<input type="radio"/> Listen to your priorities & upcoming KPIs					
<input type="radio"/> Share our insights from similar companies					
ON TRACK Proof of Value	3	03/09/23	03/12/23	TEAM MEMBER ▾	TEAM MEMBER ▾
<input type="radio"/> Demo to show how we can help meet your needs					
<input type="radio"/> Feedback on potential impact to your business					
ON TRACK Technical Analysis & Business Recommendation	25	03/12/23	04/08/23	TEAM MEMBER ▾	TEAM MEMBER ▾
<input type="radio"/> Review data from PoV					
<input type="radio"/> Share formal recommendation to key stakeholders					
<input type="radio"/>					
ON TRACK Risk Mitigation (Security etc.)	2	04/06/23	04/08/23	TEAM MEMBER ▾	TEAM MEMBER ▾
<input type="radio"/> Address any concerns about implementation process					
<input type="radio"/>					
ON TRACK Commercials	20	04/08/23	05/05/23	TEAM MEMBER ▾	TEAM MEMBER ▾
<input type="radio"/> Scoping & price negotiation					
<input type="radio"/> Operations approves proposed contract					
<input type="radio"/> Approves proposed budget					
<input type="radio"/> Sign contract					
ON TRACK Implementation	20		06/02/23	TEAM MEMBER ▾	TEAM MEMBER ▾
<input type="radio"/>					
<input type="radio"/>					
<input type="radio"/>					
<input type="radio"/>					

GO LIVE:

6

06/12/23

ON TRACK Check In

20

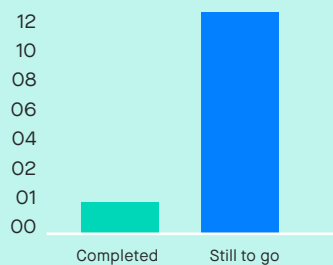
07/10/23

TEAM MEMBER ▾

TEAM MEMBER ▾

-
-
-
-

MUTUAL ACTION PLAN: VALTRON & CBRIGHT G5 DEAL



Target Go Live	07/05/23
Target Start Date (Calculated)	01/17/23
Anticipated Go Live (Calculated)	06/13/23
Days to Go Live (Calculated)	120
Typical Process Length	120

[Jump to team members](#)

Questions?

Call or email **Name** anytime
999.999.9999,
name@company.com

TARGET DATE	DONE	DAYS	MILESTONE	WHO'S RESPONSIBLE	OUTCOME/NOTES
01/17/23	<input checked="" type="checkbox"/>	10	Review Value Prop and agree we have good fit		
01/31/23	<input type="checkbox"/>	5	Identify pilot people and get them onboard		
02/07/23	<input type="checkbox"/>	20	Run pilot w/ 3 users		
02/07/23	<input type="checkbox"/>	10	Review pilot results		
03/21/23	<input type="checkbox"/>	5	Confirm success metrics		
03/28/23	<input type="checkbox"/>	5	Present business case with ROI		
04/04/23	<input type="checkbox"/>	5	Confirm proof of value		
04/11/23	<input type="checkbox"/>	10	Identify & resolve any outstanding items		
04/25/23	<input type="checkbox"/>	10	Vendor selection and initial negotiation		
05/09/23	<input type="checkbox"/>	5	Final negotiation		
05/16/23	<input type="checkbox"/>	15	Contract Execution		
06/06/23	<input type="checkbox"/>	5	Team onboarding		
06/13/23	<input type="checkbox"/>	15	Service is live		
07/05/23		30	Target Go live	EXTERNAL	EXTERNAL
08/15/23		90	First Date of Value		
12/19/23			Primary ROI Confirmed		

TEAM MEMBERS

VALTRON & CBRIGHT G5 DEAL

BUYING TEAM	ROLE	TEAM MEMBER	EMAIL	PHONE	NOTES
	Engineering Manager	Buyer Name			
	Finance Manager	Buyer Name			
	IT Admin	Buyer Name			
	Legal Review	Buyer Name			
	<other>	Buyer Name			
	<other>	Buyer Name			
	<other>	Buyer Name			

SELLING TEAM	ROLE	TEAM MEMBER	EMAIL	PHONE	NOTES
	Account Executive	Buyer Name			
	Director of Sales	Buyer Name			
	Sales Engineer	Buyer Name			
	Customer Success Manager	Buyer Name			
	Finance / Contracts	Buyer Name			

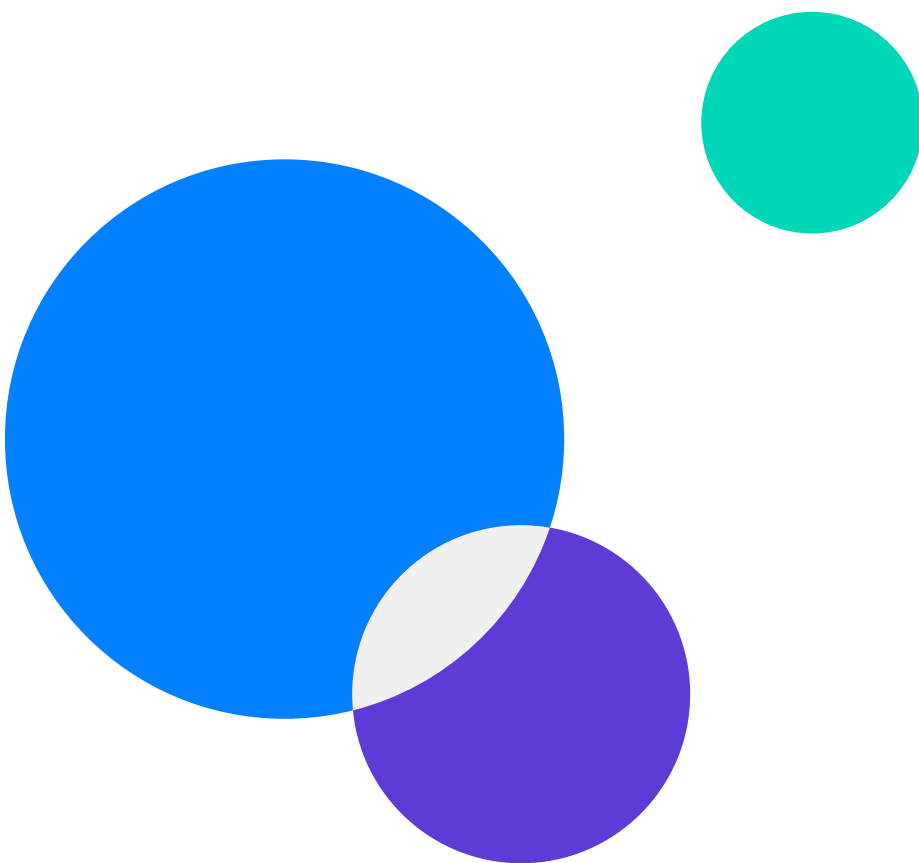


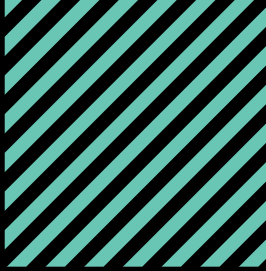
RUN YOUR DEALS AND REVENUE IN THE SAME PLACE

You are welcome to use this free template, but to really get the full benefit of alignment with customers, consider [Clari Align](#), a cloud-based mutual action plan and deal room. It runs either standalone, connected to SFDC, or fully integrated into Clari so you can manage your deals the same place you run your deals where you run your revenue.

WANT MORE TACTICAL PLAYBOOKS?

- 01** | [Subscribe to RunRevenue.Pro](#) so you get immediate access to new Precision Playbooks designed for improving your sales performance
- 02** | [Follow Clari on LinkedIn](#) if you want more tips for hitting your number and achieving revenue precision





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