

Mutual Action Plan - Template & Guide

Use the [Mutual Action Plan Template Document](#) from the opportunity management workshop (below) OR the [Mutual Action Plan Sheet](#)

Mutual Action Plan Templates

[*NEW* Revver Mutual Action Plan Template \(Google Sheet\)](#)

[*New* Mutual Action Plan Template \(Excel\)](#)

Why use a mutual plan template in the sales process?

- Identification of key milestones the prospect and the sales team will do to evaluate whether to move forward
- A commitment to evaluate go/no-go decisions based on specific milestones
- Agreement with customer that if they give you the information you need, you'll give them access to resources
- A plan for what you and your prospect need by when to accomplish their business objective (which backs into estimated close date or go-live date)

Components of Mutual Plan Emails/documents

- Pain
- Reasons to get rid of the pain
- Vision for the solution
- Agreement to explore
- Bargain/hooks - milestones
- Proof/plan proposal

- What happens if they don't hit their milestones?
- Key: Agreement on go/no-go decision milestones are established, adopted, and reviewed

Mutual Plan Overview: Assessing Business Fit and Commitment

Components of Effective "Mutual Plan E-mails"

1. State prospect's major issues & objectives
2. Confirm initiatives and major goals
3. State problems & desired outcomes
4. Summarize how eFileCabinet can help solve their problems
5. Propose milestones based on desired decision date for purchase, go-live
6. Ask for a meeting to review & agree to milestones

Sample eFileCabinet Mutual Plan Email/Document:

Email Subject: Summary of Next Steps with eFileCabinet

Dear <First Name>:

Thanks for taking the time to meet with me/us today. Following is a summary of our meeting. If I've missed or misrepresented anything, please feel free to add or correct. I/we are excited by the potential to earn <XYZ company's> business. Below are our proposed next steps as you plan to implement document management solutions at <XYZ Company> or <state planned goals or problems they want to solve.>

Attendees:

<list names> including yours and any other eFileCabinet people on the call/meeting

Current Situation:

<Describe current pains and opportunities with managing documents and associated workflows, permissions, versioning, and security, issues & any other complementary programs or competitive

solutions in place now that are relevant to describing problems they want to solve or gains they want to enable>.

Concerns:

<State problems here.> <State how they want to solve these problems>. <Company Name> would like to <state the metrics they want to have insights to/metrics/quantitative goals they want to achieve. When possible, site metrics around revenue impact, cost savings, time savings, productivity increases, risk mitigation.>

eFileCabinet Solution:

- <List key gains/value props they would like to achieve>
- <Site areas where eFileCabinet can assist them in solving their problems stated above>

<List solutions eFileCabinet provides <Company Name> the ability to _____> <Insert language here on how we fix the problems cited in the first two sections...Note: this paragraph is for our champion to share with other decision-makers on eFileCabinet's key differentiators that match to how we will help solve their problems>

Next Steps:

<choose next few steps depending on where you are in the deal with the prospect...don't have to include steps all the way through to "Go Live" if unclear at this point>

Option #1: (Lightweight/earlier in sales process version)

You will find below a proposed timeline. We can move as fast or as slow as you want but we'll hold each other to this schedule once we decide.

- 10/14/22 - Initial Discovery Call (completed)
- 10/21/22 - Custom Demo with <company name> docs and associated XYZ workflows & success criteria agreed upon*
- 10/28/22- Build Business Case for eFileCabinet with (economic buyer)
- 10/28/22 - IT & Security review including data residency requirements
- Week of Nov. 2nd - Review Business Case, IT/Security review and eFileCabinet pricing proposal meeting
- 11/9/22 - Go/No-Go Decision*
- 11/17/22- Go-live with eFileCabinet

*Denotes dates on which <Company Name> and eFileCabinet will make mutual go/no-go decisions of the buying/sales cycle

Please look at my proposed evaluation plan and I will call you on <date> to come to a mutual agreement on next steps.

Thank you,

<Signature>

Option #2: (“comprehensive version”)

Action	Date	Owner	Attendees	Status
Discovery Call	today	eFileCabinet AE	AE, Evaluator	Complete
Custom Demo (virtual)	Tomorrow	eFileCabinet AE, eFileCabinet SE	Customer Champion, Economic Buyer, Evaluation team, etc.	Scheduled
Evaluation & Procurement Process Call	Week of	eFileCabinet AE	Customer Champion	Scheduled
eFileCabinet Proposal & Business Case		eFileCabinet AE	Customer Champion, Signer, Buyer, Evaluation team	Incomplete
Go / No-Go Decision		eFileCabinet AE	Customer Champion	Incomplete
If Go, Introduction to Legal & Procurement		Champion		Incomplete
eFileCabinet Contract Signed		Signer / Economic Buyer		Incomplete
Go-Live with eFileCabinet: Kickoff Call		Champion / Sponsor /	eFileCabinet CSM & On-boarding Team	Incomplete
Migration of X type documents				
Admin Training				
Accounting & AP Deep Dive training				
Quarterly Business Review		eFileCabinet CSM	Champion, Executive (Signer), other users	Incomplete

Note: Based on “Solution Selling” by Michael Bosworth, p. 142, <DO NOT PUT THIS IN THE EMAIL OF COURSE!>

[eFC Mutual Action Plan Template Sheet](#)

Revision #5

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