



Building elite sales teams

SOFTWARE SALES MUTUAL ACTION PLAN

Mutual Action Plan

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| Subject Line | Recap of our conversation as promised |
| Opening | Dear Phil, I enjoyed our conversation. Below is the summary of my notes which I promised to send for your review. We covered a lot of ground, so please let me know if I misinterpreted anything we discussed. |
| Unique Need | Your needs are: <i>(In this section you should write a synopsis of the need <u>in their words</u>. This should be the longest paragraph of the note.</i> |
| Unique Vision | Your ideal solution would include: <i>(A brief, conceptual overview of the solution you co-created with the buyer).</i> |
| Money | We discussed an investment of \$_____. |
| Co/No Go Roadmap | You want a solution in place no later than (<i>date</i>). To meet your timeframe, we decided on the following plan: (This section is a series of scheduled milestones that lead to the ultimate Yes or No.) Step 1 Step 2 Step 3 |
| Close | Did I get anything wrong? Sincerely, Steve Kraner |