Mutual Action Plan (MAP) Framework

for Sales Leaders

Introduction

Welcome to our Management Action Plan (MAP) Framework, a comprehensive tool designed to assist sales teams in creating effective, structured action plans tailored to each unique selling and buying experience. This framework serves as a foundational guide, helping teams to systematically organize and execute their strategies through a clear and collaborative approach.

Purpose of the MAP Framework

The MAP Framework is intended to help sales leaders and their teams craft detailed Management Action Plans that guide both buyers and sellers through the complexities of the purchasing process. By using this framework, teams can ensure a consistent and thorough approach, making every customer journey smooth and effective, especially for first-time buyers.

How to Use This Framework

To create an effective MAP, follow these guidelines:

1. Collaborative Planning: Assemble a diverse team that includes members from sales, sales enablement, and customer success. This variety ensures that all aspects of the customer journey are considered, from initial contact through post-purchase success.
2. Workshop Sessions: Dedicate two focused sessions, each lasting 2-4 hours, to discuss and define the different phases and actions of your MAP. These sessions are critical for brainstorming and aligning on goals, milestones, and responsibilities.
3. Continuous Input and Homework: Encourage team members to engage in independent work between sessions. This approach allows for deeper research and reflection, enhancing the development of the MAP.
4. Feedback and Training: After drafting the MAP, create opportunities for feedback and iterative refinements. Incorporate regular training sessions to ensure all team members are proficient in executing the plan.

Components of the MAP Framework

The MAP Framework includes several key components to guide your team in developing a comprehensive action plan:

1. Objective Setting: Define clear objectives for the MAP, prioritizing them to align with broader sales goals.

2. Phases and Milestones: Identify the key phases of the customer journey, specifying milestones and deliverables for both the buyer and seller at each stage.

3. Action Items: Outline specific actions needed to advance through each phase, assigning responsibilities and deadlines.

4. Stakeholder Identification: Recognize all relevant stakeholders, detailing their roles, expectations, and the impact they have on the project.

5. Communication Plan: Establish protocols for how and when team members communicate, ensuring everyone is informed and engaged throughout the MAP process.

6. Tools and Resources: List all necessary tools and resources required to support the actions and phases of your MAP.

7. Monitoring and Adjustments: Set criteria for reviewing progress and a process for making necessary adjustments to the plan.

8. Feedback and Iteration: Develop a method for collecting and incorporating feedback to continuously improve the MAP.

By adhering to this framework, your team will be well-equipped to create customized, effective MAPs that align with both the needs of your buyers and the strategic goals of your organization.

1. Objective

- **Instructions**: Clearly define the objective of why you are using a MAP. If you have multiple objectives, rate them in order of importance.

Objective	**Description**
1	*"Guide the buyer through the buyer journey as it is often the first time they buy this type of product. [MAIN]"*

2. Key Phases and Milestones

- **Purpose**: Outline the major phases of the project, each with key milestones from both the buying and selling perspectives.

- **Instructions**: List each phase and its expected outcome, along with specific milestones and associated deliverables for each party.

Phase	Milestone Description	Deadline	Deliverable (Buyer)	Deliverable (Seller)	Responsible Person
1	*Discovery*	*Day /week/month and what will happen if not reached*	*Challenges, goals & needs*	*Initial ideas on how we can help*	*XX / YY*

3. Action Items

- **Purpose**: Detail specific actions required to progress through each phase of the project to achieve a milestone. The importance (High/low) can be used to set a , this is only used internal to be able to tell,
- **Instructions**: Identify necessary actions, assign responsibility, and set deadlines.

Action Item	Description	Deadline (timeline)	Importance (High/low)	Responsible Person
1	*Analysis of the current state*	*Day /week/month and what will happen if not reached*	*High*	*Buyer 1*
2				

4. Stakeholders Identification

- **Purpose**: Identify all relevant stakeholders who influence or are impacted by this project. This will be used to make sure all important stakeholders are involved in the "correct" stage of your MAP.

- **Instructions**: Use the table below to list stakeholders, describe their roles, outline their expectations, and note how they can impact subsequent steps in the project.

Stakeholder Name	Role in Project	Expectations	Impact on Next Steps
Sarah	*CFO*	*Needs to sign off on a solution and budget. Need to understand and confirm business case*	*High - needs to be involved early.*

5. Communication Plan

- **Purpose**: Establish how stakeholders will communicate throughout the project and how you can get them involved. When should you ask for them to join a meeting and why?

- **Instructions**: Define the frequency of updates, methods of communication, and key communication points to different stakeholders.

What	When	Key Points	Stakeholders to involve
Business case walkthrough	*In solution stage*	*Present and agree on situation and confirm ROI*	*CEO or/and CFO* *Ambassador*

6. Tools and Resources

- **Purpose**: List all tools, resources, and systems that will be used to complete the project.
- **Instructions**: Specify tools and resources needed for each action item or phase.

Tool/Resource	Purpose	Required for Phase/Action Item
GetAccept	*Information sharing, communication, MAP*	*All of them*

GetAccept

7. Monitoring and Adjustments

- **Purpose**: Define how the project's progress will be tracked and how adjustments will be made.

- **Instructions**: Describe the criteria for reviewing progress and the process for making necessary adjustments.

Review Criteria	Review Frequency	Adjustment Process
Task & Milestone completion	*Weekly*	*Involve core buyer group to align on needed adjustments*

8. Feedback and Iteration

- **Purpose**: Collect feedback to refine the MAP.
- **Instructions**: Outline how feedback will be gathered and utilized to improve the project.

Feedback Method	Timing	Feedback Reviewer
Stakeholder & buyer group check-ins	*Weekly*	*Seller 1*