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Mutual Action Plan (MAP) Template & Best Practices

By Gilad Komorov for Horizon Capital

A MAP **i**s a powerful tool for sales teams to align with their buyers, build trust, and create a clear roadmap to a successful deal. By collaboratively outlining key milestones, stakeholders, and timelines, a MAP ensures that both the seller and the buyer stay on track, minimizing surprises and accelerating the path to a closed deal.

Why Use a MAP?

- **Creates Alignment** – Establishes clear expectations and next steps for both parties.
- **Builds Buy-In** – Helps your champion drive internal approvals by outlining key stakeholders and deliverables.
- **Reduces Risk** – Identifies potential roadblocks early and ensures deal progression.
- **Accelerates Sales Cycles** – Keeps momentum by maintaining accountability on both sides.

When to Introduce a MAP?

The best time to introduce a MAP is as soon as a deal moves into a serious evaluation stage, typically after initial discovery and once there is mutual interest in moving forward. It should be framed as a collaborative planning tool to help the buyer navigate their own internal buying process efficiently.

How to Present a MAP?

- **Position it as a Value-Add** – Explain that the MAP is designed to help the buyer, not just the seller.
- **Collaborate, Don't Dictate** – Build the plan together with your champion and key stakeholders.
- **Keep it Dynamic** – A MAP should be a living document, continuously updated as the deal progresses.
- **Use Clear Milestones** – Break down the buying process into tangible steps with owners and deadlines.

Check out the MAP template (on the next page) to streamline your sales process and close deals with greater predictability. Simply copy/paste it into your own spreadsheet/google sheet, adapt it to your requirements, and start sharing it with prospects.

* Gilad Komorov is Horizon's Growth & Revenue Specialist
As a three-time Chief Revenue Officer with over 20 years of experience, Gilad has helped companies such as LivePerson, Clarizen, Feedvisor, Verbit, Lightico, and Granulate (Intel) design, build, and scale their revenue operations.

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MAP template

[YOUR LOGO HERE] **[CUSTOMER LOGO HERE]**

[-CUSTOMER NAME-] Mutual Action Plan		
Last Updated:	**[Date]**	By:

General Information	
Company Name	
Company Description	
Target Go Live Date	
Use-Case	
[Company Name] Product	

Brief Overview
[provide a high-level summary of the engagement capturing the details of the customer's current situation, including identified pains, compelling events and any existing solutions. This can be modified as additional details are gathered]

Important Resources - Shared Folder		
Resource	Status	Detail
[Name + Link]		
[Name + Link]		
[Name + Link]		
[Name + Link]		

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[YOUR COMPANY] Team		
Name	Email	Role
		Customer Development Manager
		Customer Success
		Executive Sponsor

[-CUSTOMER-] Team	
Name	Role

Planned Steps and Key Events					
Stage	Action (*Denotes Important Steps)	Owner	Stakeholders Involved	By When	Complete?
1	Introductory Meeting				YES
2	Demonstration				YES
3	POV Planning Meeting				YES
4	POV				
5	POV Summary Meeting				
6	Commercial Proposal shared				No
7	MSA shared for review				No
8	MSA & PO signatures				No
9	Kick-Off Call				No
10	Completion of Case Study				No

Action Items (add as many as you need)		
Action	Owner	Target Completion Date