# Mutual action plan

Guide both teams through the steps to project kickoff.

Work backward from the customer outcome. Dates need confirmation. Completed steps need visible evidence.

**COMPLETED EXAMPLE - FICTIONAL**

Goal: simplify reporting before the November close. 7 Oct: Finance confirms trial measurements. 9 Oct: IT confirms integration. 14 Oct: Legal resolves open clauses. 16 Oct: CFO decides budget. All illustrative dates confirmed; schedule kickoff after approval.

| Account / joint plan owners | As of / next review |
|---|---|
| | |

| Customer goal / metric / desired start and business reason |
|---|
| |

## 1 Milestones to the customer outcome

| Milestone + evidence of completion | Owner / side | Date / confirmed? | Dependency / status |
|---|---|---|---|
| | | | |
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# Mutual action plan

Continue the worksheet. Separate facts, assumptions and commitments.

## 2 Check the full buying process

**Budget / procurement / legal / security / signing: Who reviews what by when?**

## 3 Resolve risks together early

| Risk / open assumption | Mitigation + owner | Due / impact on plan |
|---|---|---|
| | | |
| | | |
| | | |

**Delay: What changes for the decision or customer outcome?**

**Customer / vendor confirmation / date**

**Next review / plan location**

## COMPLETION CHECK

- [ ] The customer contributes to the plan.
- [ ] The goal and metrics are documented.
- [ ] The buying process and relevant reviews are known.
- [ ] Each milestone has an owner and a confirmed date.
- [ ] Project kickoff and regular reviews have been discussed.