

NEW BUSINESS DEVELOPMENT & SALES · TEMPLATE

Mutual Action Plan and Negotiation Planner

For account executives and sales leaders planning the path to signature with the buyer and preparing negotiations that protect margin.

How to use this: Draft the plan yourself, then send it to your champion to correct. Their edits are the most valuable part. Complete the negotiation sections before any commercial conversation, and keep the concession log current.

Anchor Date and Working Back

Start from a date the buyer cares about, not your quarter end.

The buyer's anchor date, and why it matters to them

Implementation time needed before that date

Latest signature date that still works

Shutdowns, holidays and approval meetings in the way

Mutual Action Plan

A dozen steps is plenty. Review it on every call with the champion.

#	Step	Buyer owner	Our owner	Target date	Status
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Hidden Steps Check

Ask about each of these early, not in the final week.

Step	Needed?	Who owns it	Lead time
Supplier onboarding and insurance certificates			
Security questionnaire and evidence			
Privacy assessment or data processing agreement			
Legal review			
Approval thresholds (CFO, CEO, board)			
Signing authority and availability			
Purchase order and budget timing			

Stakeholder Coverage

One relationship is one point of failure.

Role	Name	What they care about	Last direct contact
Economic buyer (signs)			
Champion			
Users			
Technical evaluator			
Procurement			
Legal			

Negotiation Preparation

Decide these before the conversation, not during it.

Target outcome: price, term and scope we can justify with the business case

Walk-away point, and why

The buyer's realistic alternatives: competitor, build it themselves, or do nothing

Approval limits: what the rep, the manager and the CEO can each agree to

Tradeables

Every concession is matched by something in return. Look for things that cost us little but matter to them.

We could give	Cost to us	We would ask for	Value to us

Examples: a price reduction for a longer term or annual payment in advance; extra onboarding support for signature by an agreed date; price protection on renewal for a multi-year commitment; flexible payment terms for a case study or reference once live.

Concession Log

Record every ask and offer as it happens. Concede slowly and in decreasing steps.

Date	They asked for	We offered	We got in return	Approved by