

Free mutual action plan template (copy, edit, send)

Use this as your starting point. Paste into your CRM notes, a shared doc, or an Introw experience. Keep it clean and adapt the headings to your motion.

Mutual Action Plan

Your Company

Partner Company

Customer / Initiative

Goal and definition of done

Your Outcome

Close Q4 co-sell with ACV $\geq$ \$XXXk for Customer X

Definition of done

e.g., Signed order form and SOW; integration enabled in production

Target date

YYYY-MM-DD

Stake holders

Customer

Name	
Role	
Email	

Partner

Name	
Role	
Email	

Team

Name	
Role	
Email	

Name	
Role	
Email	

Milestones

Milestone 1

Owner Name, Company	
Due date YYYY-MM-DD	
Evidence Link or artifact	

Milestone 2

Owner Name, Company	
Due date YYYY-MM-DD	
Evidence Link or artifact	

Milestone 3

Owner Name, Company	
Due date YYYY-MM-DD	
Evidence Link or artifact	

Milestone 4

Owner Name, Company	
Due date YYYY-MM-DD	
Evidence Link or artifact	

Dependencies

e.g., Security questionnaire must complete before legal review

Risk and mitigation

Risk	
Owner	
Role	

Cadence and communication

Weekly 15-minute sync on

Day	
Time	

Async updates via

Channel name	
Channel name	

Late tasks flagged after _____ days; owner proposes new date and plan.

Next review

Date YYYY-MM-DD	
Agenda What will be decided or unblocked	

Change log

Date YYYY-MM-DD	
Owner Name	
Change made	