

Client and BU Name - Mutual Action Plan

Plan Owners
Last Updated

Decision Maker and Internal Rep
Date and Time

Cigna Team Members	PathFactory Team Members	Notes
List all members of the buying committee - add in real time	List all supporting members of the team - add in real	

Summarized Compelling Event and Impact					
Compelling Marketing Event	Identify a key compelling moment that will or is driving the purchase decision. E.g. Healthcare insurance - Open Enrollment happens in October/November				
Impact	What impact will PathFactory have on the business, the GTM strategy, the people involved? Discovery questions				
Action Item	Description	Owner(s)	Target Date	Status	
Complete Mutual NDA	Who's MNDA is used? Who signs first etc.?	Client Owner		Complete	
New Vendor Process	Are we a new vendor? If so, what is the process. What documents are required from us?	Procurement		Not started	
Information Security Process	We are SOC2 compliant & have some standard documents we're happy to provide as you begin this process. Do you have experience going through this at your company? Do you have a sense of typical timeline & resources required on our end?			In progress	
First Call	What was the intent? Who attended what was the outcome?				Any key meeting discussions and outcomes can be shared here.
Additional Discovery & Current Portal Overview	Backend Demo and brainstorming session on Custom Demo Use case for PathFactory to build. Review of content assets provided by client NOTE to PF: Custom Demo requests are submitted through sfdc. Link to demo should be included on Opportunity page				Highlight key insights, goals, objections and processes that are shared
Presentation of Custom Demo First Draft	Insert links to all custom demos and use cases shared with customer				Feedback: POSITIVE or NEGATIVE Identify potential crawl walk run against specific use cases
Wider Team Presentation of Custom Demo	Carey to present the custom demo build for Cigna IFP use cases.	IT, who else? Executives, Purchasing, InfoSec			
Who else needs to see this?	Identify other influencers that we need to present this solution to	Who else?			
Pricing Shared	What pricing was shared and to whom? What was negotiated? Terms, Amount, Payment scheduled etc.	Who was there?			How was the proposal received? Who else will it be shared with?
Agreement to proceed with mutual action plan	Identify timeline - Action plan for hitting milestones and timelines				
Confirm communication preferences	Weekly calls? Preferred contact channel - cell, text, etc?				
Weekly project calls scheduled	Weekly touchpoint				
Confirm First Project/Program/Campaign	Have we confirmed the initial project(s) above? -				
Investment Justification	Is an investment justification case required?				
Budget Confirmed					
Technical Session	Do you need further sessions to understand integrations, how to use our data, how we work with your CMS, etc.				
Introduction to Procurement					
Legal	What is required to be compliant legally? TOS, OF, PO? Whose paper, who signs first, what is the turn around time usually?				
Kick-off call with CX Team Scheduled	30 minute meeting to talk through the next steps and milestones over the next 30-60-90 days.				
Technical Onboarding Scheduled	Integrate with your MAP, forms and tracking. Setup all branding and language options				
Customer Success Onboarding Scheduled	Training for the entire team on how to use the tool, best practices and tips and tricks				

PF Customer Resources & Programs	<p><u>Customer Resources & Programs above and beyond your Customer Success team:</u></p> <p><u>Customer Newsletter: The Path:</u> Our newsletter is where you'll find all our latest updates! Check out what we're doing to help you get the most from PathFactory.</p> <p><u>Weekly Customer Success Series:</u> Block 30-minutes bi-weekly to attend this best practices webinar series. We'll share tips and tricks, as well as what other customers are doing to be successful.</p> <p><u>Weekly Masterminds:</u> Our weekly Masterminds session is meant to help clear your roadblocks and solve all your tactical challenges - no question is too big or small.</p>	PathFactory Marketing & Solutions Leaders, Customers	weekly	ongoing	
First Campaign Launched	What is the goal of the campaign? More free trial signups? Recycle lost opportunities to increase velocity and reduce sales cycle?				
Second Campaign Launched					
Third Campaign Launched					
Q1 QBR - Review of first campaigns launched	A focus on the first few campaigns that have been launched, how successful they have been. Your CSM will also outline a number of best practices and suggestions for future campaigns				
Q2 QBR - Goal tracking and driving value with PF	You should really be realizing value with PathFactory by this point. How are we tracking to achieve your goals set out? How do your visitors behave and what are the content analytics that will help drive success with future campaigns?				
Q3 QBR - Use case expansion and full analytics review	By this point we are looking to have PathFactory used across a number of use cases. How are the use cases performing and where can we improve? We will take a deep look into your analytics at this stage - how are your visitors behaving, what types and topics are resonating with your audience and giving you the best return on your investment? How is PathFactory influencing your opportunity pipeline and what is the overall ROI for the tool?				
Q4 QBR - Preparation for next year	What are the goals we are looking to achieve next year - your marketing and sales goals as well as specific PathFactory metrics we are looking to improve on? How are we going to achieve that - working together with your CSM let's put a plan together to ensure we can. In addition to looking deep at engagement metrics, we will do a full health check of your PathFactory instance - are you following the best practices to get the most out of the platform? Are there areas we can improve to save your team time, improve tracking and reporting, organization, etc.				
Speaking Opportunity	<p><u>Identify interest in speaking/presenting success with PF at one of the industry conferences. SD? MCX? Adobe? Gartner? etc?</u></p> <p><u>Are you (my champion) interested in career advancement type opportunities to showcase your personal success with a vendor?</u></p> <p>Read more about our Advocacy Opportunities</p>				
Reference Status	Are you open to being a reference in the future?				