

Trigger Map and Outreach Planner

Pairs with: Map the trigger, not just the pain

Identify the events that create buyer urgency.

Founder / team	Account / market / topic	Date
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When to use it Use when buyers understand the pain but do not move.

What this worksheet covers

Trigger type	Buyer role
Pain created	Timing
Message angle	Outreach action

Questions to answer before you start

What changed recently for the buyer?

What date matters?

Who is measured on the outcome?

What trigger should shape your message?

What action do you want the buyer to take?

Trigger library

Trigger type	Buyer role	Pain created	Timing	Message angle	Outreach action
Regulatory date	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Audit finding	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Failed project	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Cost pressure	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
New leader	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Customer harm	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Competitor move	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Board priority	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____
Budget cycle	_____ _____	_____ _____	_____ _____	_____ _____	_____ _____

Outreach plan

Target account	Trigger observed	Message angle	Ask	Next step date
Account 1	_____ _____	_____ _____	_____ _____	_____ _____
Account 2	_____ _____	_____ _____	_____ _____	_____ _____
Account 3	_____ _____	_____ _____	_____ _____	_____ _____
Account 4	_____ _____	_____ _____	_____ _____	_____ _____
Account 5	_____ _____	_____ _____	_____ _____	_____ _____

Risks, gaps, and evidence needed

Risk or gap	Why it matters	Evidence or action needed	Owner/date
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review
