



## FEEL GOOD ABOUT SELLING - EMAIL FOLLOW UP TEMPLATE

A good email follow-up is important. It helps confirm everyone is on the same page. It sets clear next steps. It allows your prospect to correct you and confirm the plan.

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*Use and adapt this template to your context. The ALL CAP sections, e.g., INTRO, are there for reference only to help layout the flow of your follow-up email. Remove before sending.*

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Hi [first name],

**INTRO:** It was good to talk with you, and I hope you got value from our time together. Following is a recap of what we discussed. Please let me know what I missed.

**RECAP THE PROBLEM:** The current situation is creating a number of scenarios, e.g., low performance, missed targets, and general tension among your team. This is resulting in approximately \$1 million in net new business, as well as lower customer satisfaction ratings.

**SOLUTION:** We discussed two solutions in which we would do the following: work with your executive team, provide some preliminary data, and run a diagnostic to uncover the performance concerns. Your current “go live” time is April 17.

**CLEAR NEXT STEPS:**

- 1) We are targeting a 30-minute follow up meeting with Janet Smith (your CFO) on March 15.
- 2) We'll review the proposed solutions and the two package options (see attached draft proposal).
- 3) The agreement goes to your legal team for final review. This review will take two to three business days.

**SIGNATURE:** Provided you decide to move forward, we discussed signing an agreement with Carol Jones (the CEO) on or before April 1.

**CAST VISION:** We're looking forward to working with you to drive the mission and vision of your organization by providing you the ability to X, Y, and Z.

**CONFIRMATION:** In the meantime, I've likely missed something. Could you please respond to this recap and confirm (or correct) this summary?

Thanks, [first name]  
[your name]

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