

## PROPOSAL FOLLOW-UP

# Automate the memory. Keep the conversation human.

A simple, reusable operating tool for teams that want clearer handoffs and less status chasing.

## Use this on one real workflow

- ☐ Day 0 — Send proposal + confirm receipt/next decision point
- ☐ Day 2 — Short check for questions or missing stakeholders
- ☐ Day 5 — Value/decision follow-up tied to stated priority
- ☐ Day 10 — Direct status check; confirm timeline or blocker
- ☐ Day 15 — Reframe next step or move to nurture with reason
- ☐ Every touch — record outcome + next dated action

## Design notes

- Cadence should adapt to deal size, urgency, and buyer preference.
- A completed activity is not the same as a future next action.
- Stop automated sequences when a human conversation changes the plan.

**How to use it.** Do not complete this from memory in a conference room. Pull up one active or recently completed record and test the checklist against what actually happened. Any item that repeatedly needs a text, a side spreadsheet, or an owner stepping in is a candidate for workflow redesign.

**Want a real answer for your workflow?** Book a free 30-minute Workflow Assessment at [bradleyhankins.com/contact](https://bradleyhankins.com/contact).