



SPARK CATEGORY: PITCH

Follow-Up That Moves the Deal

Preserve momentum, reinforce what matters, and make the next step unmistakably clear.

A recap records the meeting. Good follow-up advances it.

Suncoast Spark · Free Resource for B2B Account Executives

Your follow-up should make the buyer's next action easier.

Most follow-up emails summarise what happened. A strong follow-up does something more useful — it gives the buyer exactly what they need to act, share, and decide.

A strong follow-up captures:

- What the buyer said matters
- What appears to be the problem
- What remains unknown
- What was agreed
- Who owns what
- When the next action happens

DO NOT USE FOLLOW-UP TO RESELL THE MEETING.

The buyer already attended. They do not need a paragraph telling them how great the conversation was or how excited you are to partner with them. Get to the work.

The Simple Structure

Five parts. Every follow-up, every meeting type.

1

Context

Thank them briefly and anchor the discussion — one sentence on what the conversation was about and why it matters.

2

What We Heard

Summarise the buyer's priorities in their language, not yours. This is the most important section. Get it right.

3

What Still Needs to Be Validated

Name the open questions honestly. Do not disguise unknowns as conclusions to make the email sound stronger.

4

Agreed Actions

Buyer and seller commitments, listed separately. Both parties own something or the next step is not real.

5

Next Step

Owner + action + timing + purpose. Not "I'll follow up." A specific event with a reason to happen.

Example: Strong Discovery Follow-Up

The difference is not length. It is precision and usefulness.

WEAK

"Thanks for your time today. It was great learning more about your business. Attached is the deck. Let me know if you have questions."

This email records that a meeting occurred. It does nothing to advance the deal. There is no reflection of what was discussed, no shared ownership of next steps, and no reason for the buyer to respond.

BETTER

Subject: Follow-up — revenue leak in the renewal cycle

Marcus — based on today's conversation, the core issue is that contract renewals are falling through because the CSM team doesn't have visibility into at-risk accounts early enough. You mentioned this has already cost two enterprise accounts this quarter.

Still open: We don't yet know whether your current CRM data is clean enough to support automated risk scoring — that's worth validating before we go further.

Agreed:

You: Share a sample of the renewal data by Friday.

Me: Return a preliminary mapping of what we'd need by end of next week.

Next: Marcus to confirm availability for a 45-minute technical review the week of the 14th — to validate whether the integration is straightforward or needs scoping.

When Information Is Still Missing

Do not manufacture certainty just to make the email sound stronger. Name what you do not know — it builds credibility and sets up the right next step.

Impact is still unclear

"We don't yet have a number attached to this — that's worth establishing together before the business case conversation."

Another stakeholder is needed

"We're missing procurement's view on vendor requirements. That conversation should happen before we go further on timeline."

Buyer requested information

"You asked for a reference in financial services. I'll identify the right contact and confirm they're available to speak."

Technical validation is required

"Integration feasibility depends on your current data model — we can't confirm scope until that's mapped."

Business case not yet established

"We don't have enough to build a credible case yet. The next step is to get to the data that would make that possible."

When There Is No Real Next Step

Do not disguise "I'll follow up" as progress. A vague next step signals that nothing was actually agreed.

VAGUE

"I'll check back next week."

"Let me know if you have any questions."

"I'll send something over and we can take it from there."

REAL

"Sarah will confirm whether Finance needs to be involved before we schedule the business-case review on Thursday."

"David will share the current vendor contract by Friday so I can confirm what's in scope before we draft a proposal."

"I'll send the security questionnaire by end of day Tuesday. Your IT lead reviews it and we reconvene the week of the 20th."

If you cannot name an owner, an action, a timeline, and a purpose — the next step is not agreed. Go back and find one before you send.

Follow-Up Checklist

Before you send — run through this. If you cannot check every box, revise.

- ☐ Did I use the buyer's language?
- ☐ Did I preserve the actual business issue?
- ☐ Did I separate facts from assumptions?
- ☐ Did I omit unnecessary sales copy?
- ☐ Are commitments clear?
- ☐ Does every action have an owner?
- ☐ Is timing specific?
- ☐ Does the next step have a purpose?
- ☐ Could the buyer forward this internally without rewriting it?

📌 That last question is the real test. If your follow-up requires the buyer to translate or summarise it before sharing it with their team, you have not done the work for them.



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