



SUNCOAST SPARK · ACTIVATE

The 15-Minute Post-Meeting Workflow

The meeting ended. Capture the thinking before you lose it.

Suncoast Spark · Free Resource for B2B Account Executives

Most deal information decays immediately after the meeting.

The conversation ends and the forgetting begins. Not because sellers are careless — because context is fragile and competing priorities are immediate.

Notes get fragmented

Partial sentences written under pressure become the official record. Critical nuance disappears between what was said and what was captured.

Interpretations become facts

What the buyer implied gets recorded as what the buyer confirmed. Assumptions harden into pipeline logic. Deals drift from reality.

Commitments get forgotten

Both sides leave with a different understanding of who owns what. Follow-through becomes inconsistent. Trust erodes quietly.

CRM updates become generic

"Good call, moving forward" tells no one anything. The system holds noise instead of signal. Coaching becomes impossible.

Next steps become vague

Without a clear owner, action, timing, and purpose, the next meeting is just another conversation — not a deliberate step forward.

A short, disciplined fifteen-minute review prevents all of this. Not because it is magic — because structure at the moment of highest context is the simplest form of deal hygiene.

❏ **Do not start with "Update the CRM." Start with "What did we actually learn?"**

MINUTES 0–3

Capture Evidence

Before anything else: record only what the buyer explicitly said or demonstrated. Do not editorialize. Do not interpret. Do not score the meeting yet.

Evidence to capture now

- What the buyer explicitly said — their words, not your summary
- New business problem evidence that emerged
- Business impact they described or implied
- Why-now evidence — urgency, trigger, or deadline
- Their current approach or existing solution
- Their desired outcome in their own terms
- Decision information — process, criteria, authority
- Stakeholders mentioned — named, described, or implied
- Commitments made — by them and by you

Separate by confidence

Known

Buyer stated it directly. You have a clear record.

Hypothesis

You believe it to be true. Not yet confirmed.

Unknown

You don't know. You need to find out.

Identify What Changed

Every meeting either advances your understanding or exposes a gap in it. Work through these questions while the conversation is still fresh.

1

What became more certain?

Which assumptions did the buyer confirm — explicitly or by how they engaged? What hypothesis is now evidence?

2

What became less certain?

What did you believe going in that the conversation complicated or contradicted? Do not smooth this over.

3

What assumption was disproved?

Something you had in the opportunity record that this meeting challenged. What needs to be corrected?

4

What new stakeholder appeared?

Was a new name, role, or team mentioned? Someone with influence, budget, or veto authority you hadn't mapped?

5

What new risk surfaced?

A competitor, a timeline constraint, an internal priority shift, a technical barrier, a budget concern that wasn't visible before.

Bottom line: Did the opportunity become **stronger**, **weaker**, or simply **different**? Be honest with yourself before you update anything.

MINUTES 6–9

Find the Gap

One unresolved condition is currently limiting this opportunity more than any other. Your job right now is to name it precisely.

Review these categories. Identify the one that matters most.

Problem

Is the business problem clear, confirmed, and agreed?

Impact

Is the cost of inaction understood and felt?

Urgency

Is there a real reason to act now?

Stakeholder

Do you have access to everyone who matters?

Champion

Is someone actively selling internally on your behalf?

Technical risk

Are integration or security requirements resolved?

Decision process

Do you know how this decision actually gets made?

Business case

Is there a compelling, quantified case for action?

Commercial

Are pricing, scope, or commercial terms aligned?

Procurement / Legal

Are there process or compliance barriers ahead?

Write it down:

The most important thing we still need to resolve is:

MINUTES 9–12

Define the Next Step

A next step that is not owned, timed, and purposeful is not a next step. It is a hope. Complete every field before you close your notes.

Owner	
Action	
Timing	
Purpose	 <i>What specific condition does this step resolve or test?</i>
Expected outcome	 <i>What do you expect to know or have confirmed after this step?</i>
Buyer commitment	 <i>What did the buyer agree to do, provide, or arrange? In their words.</i>

- ❏ If you cannot complete the Purpose and Buyer Commitment fields, the next step is not yet defined. Go back and confirm it — by email if necessary — before you move on.

Update the System

Now — and only now — open the CRM. You have the evidence. You have the gap. You have the next step. Now you can record what actually matters.

What to update

- CRM stage — only if the evidence from this meeting supports a change
- Key evidence — what the buyer said, not what you think it means
- Open questions — named unknowns, not vague uncertainty
- Stakeholder changes — new names, roles, or influence shifts
- Tasks — owner, action, and date for every commitment
- Follow-up — send it now while the context is intact
- Calendar event — schedule what was agreed before it drifts

The standard to hold

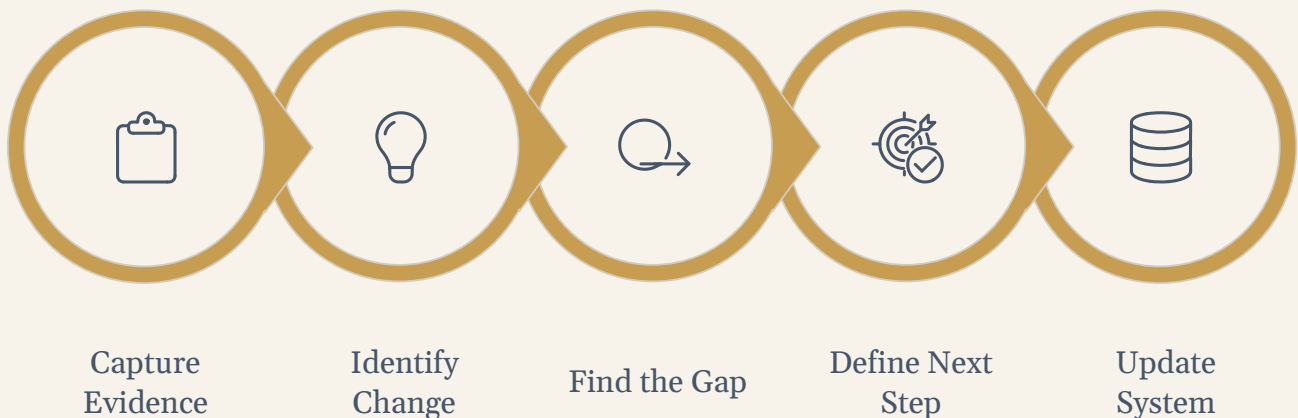
Do not

Turn the CRM into a transcript.
Volume is not signal.

Do

Capture what changes the deal.
Evidence.
Unknowns.
Commitments.
Risk.

Ask yourself: if your manager reads this record tomorrow, will they understand where this deal actually stands — or will they see activity?





AE ON DEMAND

Paste the notes. Keep the judgment.

AE on Demand helps account executives turn meeting notes or transcripts into structured evidence, unknowns, follow-up, CRM-ready updates, opportunity risks, and recommended next steps — inside ChatGPT or Claude.

Use it immediately after a meeting to do in seconds what this workflow does in fifteen minutes. Or use it to pressure-test your own thinking before you commit to a direction.

Structured evidence

Known, hypothesis, and unknown — separated automatically.

CRM-ready updates

Concise, evidence-based entries that capture what changes the deal.

Recommended next steps

Owned, timed, and tied to the gap that most limits the opportunity.

Explore AE on Demand at aeondemand.com

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