

Document 5: First Meeting Follow-Up Checklist

Within 24 Hours

Email/WhatsApp Message Template:

Hola [Name],

Gracias por tu tiempo hoy. Fue muy interesante conocer sobre [specific detail about their business]

Como acordamos, te envío:

- [X] One-pager de GabeDA
- [X] Ejemplo de reporte (anonymizado)
- [X] Acuerdo de procesamiento de datos para revisión

Basado en lo que conversamos, creo que podríamos generar valor específicamente en:

1. [Specific insight mentioned in meeting]
2. [Another specific insight]
3. [Third specific insight]

¿Te parece si nos juntamos [specific date/time] para revisar y ver si avanzamos?

Mientras tanto, si tienes cualquier pregunta, escríbeme nomás.

Saludos,
Gabriel

Gabriel [Apellido]
GabeDA | Decisiones Inteligentes para Tu Negocio
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If They Showed Interest

Action Items:

- ☐ Send personalized example insights for THEIR business (even if hypothetical)
- ☐ Schedule follow-up meeting within 7 days
- ☐ Prepare draft of first month's analysis scope
- ☐ Send data processing agreement with highlighted key sections

If They Were Lukewarm

Action Items:

- ☐ Identify what the real objection was

- ☐ Send relevant case study or testimonial (once you have them)
- ☐ Offer free 30-min "audit" of their current reporting
- ☐ Add to follow-up list for 30-day check-in

If They Said No

Action Items:

- ☐ Thank them genuinely for their time
 - ☐ Ask if you can follow up in 3 months
 - ☐ Request referrals: "¿Conoces otro negocio en Villarrica que podría beneficiarse?"
 - ☐ Learn from the rejection: What objection couldn't you overcome?
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