

Call Summary Example

Don't forget to write and send a call summary after any consequential meeting. Include:

- ✔ Key highlights and takeaways
- ✔ Specific date and time of your next meeting
- ✔ Emphasize your prospect's situation, goals, and challenges and how you can help them

Hi {Prospect Name},

Thanks for sharing your {issues and goals} today, as well as {our shared experience}.

To summarize, your priorities are {problems, struggles, challenges}. I've mentioned _____
{resource, tip}. I've also attached {video link, document} we discussed, that may help you.

Please don't hesitate to call on me for more information or questions. I'm looking forward to our next meeting {date and time, link to calendar invite or meeting platform}.

All the best,

{Your Name}

