

# Alan Operator

Sample packet

## Post-Call Follow-Up Packet

Northline Growth x Riverstone Dental Group

**Call type:** discovery call

**Lead source:** paid search

**Status:** warm

### Client-ready recap email

Thanks again for today's call. The immediate priority is tightening lead quality and getting same-day follow-up out after inbound consult requests. The current drag points are delayed recap emails, scattered CRM notes, and proposal momentum dying after strong discovery calls.

Recommended next move: Northline sends a 14-day audit scope and timeline, Riverstone shares the last 60 days of lead-source and close-rate breakdown, and both sides confirm whether the first test campaign should focus on implants or broader high-value treatment lines.

### Next steps

- Northline sends audit scope by tomorrow 2 PM
- Riverstone shares campaign and CRM exports
- Confirm first offer focus before proposal draft

### Open questions

- How much current lead volume is branded vs non-branded?
- What closes best right now: implants, emergency, or broader care?
- Who owns same-day lead follow-up internally?

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## Action summary

### Immediate execution plan

- Send the recap email the same day.
- Assign the exports and follow-up owner now.
- Keep proposal framing tied to lead quality and follow-up speed.

1

### Today

Send the recap, request exports, and confirm who owns same-day lead follow-up.

2

### Tomorrow morning

Review exports, choose first offer focus, and tighten the proposal angle.

3

### Proposal trigger

Once exports and offer focus are in, draft the first audit-led proposal.

### What a buyer should feel after reading this packet

The call was productive, the agency understood the real problem, the next steps are obvious, and the team is already moving instead of getting stuck in post-call admin drift.

### Use case

Best used when the call went well but the follow-up would otherwise become delayed, vague, or half-finished.