COMPANION TO THE SALES EMAIL FIELD MANUAL

# SALES EMAIL PROMPT LIBRARY

ALL 99 COPY-READY AI PROMPTS

Every prompt from R11-01 to R11-99, in 11 categories, ready to copy, fill in, and review

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# FIND YOUR PROMPT

Nine prompts in each of 11 categories. Each tile jumps to its first page.


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## HOW TO USE A CARD

**01** **Find.** Pick the category that matches what just happened, then the prompt that matches the decision in front of you.

**02** **Copy.** Select the prompt text on the card and copy it. Every prompt is complete on its own.

**03** **Fill.** Replace each bracketed field with a fact you can verify. Leave optional fields out if you cannot.

**04** **Review.** Read the sender review on the card, check the draft against your records, and send it yourself.

CATEGORY 01 OF 11 | PART 1 OF 3

# COLD OUTREACH

R11-01 to R11-08 + R11-81
On this page: R11-01, R11-02, R11-03

## R11-01 Company announcement

*Use when: A prospect made a public announcement that your offer directly supports.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company of the person closest to the announced work]
Scenario: [the announcement in one sentence]; [where it was published and the date]; [the one task it creates that my offer covers]
Optional: [approved proof I may cite]; [preferred next action]

Write a first email that names the announcement plainly, connects it to the one task it creates, and asks whether that task is already assigned. Keep the focus on their plan, with one line on my offer. If the source or date is blank, or the announcement is more than 90 days old, reply only with a Needs input list asking me to confirm it is current. Do not guess at their budget or timeline. Return two truthful subject options and one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Open the source and confirm the announcement is current and says what the email says.

## R11-02 Role-specific problem

*Use when: You know the reader's role and a workflow that role usually owns, and nothing about their company.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [recipient's role]; [the workflow this role usually handles]; [the one service of mine that touches that workflow]
Optional: [approved proof I may cite]; [preferred next action]

Write a first email that asks how the reader handles the workflow today, phrased as a question about the role, then offers one specific way I help. Do not state or imply that their team has a problem. If the role is blank, reply only with a Needs input list. If I gave no company facts, write from the role alone and leave out every claim about their business. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Delete any sentence that diagnoses their team. You have no evidence for it.

## R11-03 Service-area introduction

*Use when: You serve a defined area and want to reach businesses inside it.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name or role, company, and the recipient's location]
Scenario: [the exact area I serve, by city, county, or zip codes]; [the service I offer there]; [the kind of business that usually buys it]
Optional: [approved proof I may cite]; [preferred next action]

Write a first email that states the area I actually cover, names the service, and asks who handles this work for their location. One short line may explain why local coverage helps with scheduling. If the recipient's location is unknown or outside the area given, reply only with a Needs input list. Do not stretch the service area or imply I already work nearby. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check the recipient's address against your real service boundary.

CATEGORY 01 OF 11 | PART 2 OF 3

# COLD OUTREACH

R11-01 to R11-08 + R11-81
On this page: R11-04, R11-05, R11-06

## R11-04 Seasonal planning

*Use when: A season or event is coming and your work needs lead time.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the season or event and its date]; [the lead time I need to schedule the work]; [the service that applies]
Optional: [confirmed open slots, only if verified today]; [preferred next action]

Write a first email that gives the practical reason to plan ahead, states my real lead time, and asks whether they have set their schedule for the season. Mention limited availability only if I supplied confirmed open slots. If the lead time is blank, reply only with a Needs input list. If the event date has passed, tell me instead of drafting. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Remove any scarcity line unless you verified open slots today.

## R11-05 New-location opening

*Use when: A business announced a new location and you offer setup or recurring work for new sites.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company of the person responsible for the new site]
Scenario: [the location and what was announced]; [the source and its date]; [whether the opening is upcoming or already happened]; [the setup or recurring service that fits a new site]
Optional: [approved proof I may cite]; [preferred next action]

Write a first email that references the opening accurately, in the correct tense, and asks about one setup or recurring need at the new site. If I did not say whether the opening is upcoming or past, reply only with a Needs input list, because the tense and the offer both change. Do not guess the opening date. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm whether the location is open yet, and match the tense to it.

## R11-06 Published initiative

*Use when: A company has published a goal or program and your offer supports work next to it.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the initiative in the company's own published words]; [the source and its date]; [the outcome my offer supports next to that initiative]
Optional: [approved proof I may cite]; [preferred next action]

Write a first email that restates the initiative in their terms, connects one outcome of mine to it, and asks one question about how the work is staffed or scheduled. If the source is blank, reply only with a Needs input list. Do not rename their initiative, grade it, or claim to know its status. Return two truthful subject options and one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Compare your wording of the initiative with the source and keep their terms.

CATEGORY 01 OF 11 | PART 3 OF 3

# COLD OUTREACH

R11-01 to R11-08 + R11-81
On this page: R11-07, R11-08, R11-81

## R11-07 No recent trigger

*Use when: You have a name or a role and a relevant offer, and no news, referral, or prior contact to mention.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name or role, company, and how I found this contact]
Scenario: [buyer role or industry]; [the one service that fits this role]
Optional: [approved proof I may cite]; [preferred next action]

Write a first email that opens with the reader's role and the service, with no claim of news, familiarity, or a known problem. Ask one fit question the reader can answer in a line, such as whether they handle this in-house or use a vendor. Having no recent news is normal here. Proceed without it and do not invent any. If the role or the service is blank, reply only with a Needs input list. Return two truthful subject options and one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Remove any invented news, familiarity, or inferred problem before sending.

## R11-08 Permission-based introduction

*Use when: You have a useful resource and want permission before sending it.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the offer]; [the kind of buyer it suits]; [the resource I can send and its format]
Optional: [approved proof I may cite]

Write a first email that says in one sentence why the resource may be useful to this role and asks permission to send it. The only action is a yes or no reply. Do not attach or link the resource in this email. If the resource is unfinished or I did not name its format, reply only with a Needs input list. Do not describe contents I did not list. Return two truthful subject options and one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm the resource exists, is current, and can go out the moment they say yes.

## R11-81 Listing discrepancy, permission first

*Use when: Two public listings for a business disagree and you want permission to share the detail.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name or role and company]
Scenario: [listing one, the detail shown, and the date I viewed it]; [listing two, the detail shown, and the date I viewed it]; [the service of mine that relates to listings]
Optional: [preferred next action]

Write a first email saying I noticed one difference between two public listings for their business and asking whether they would like me to send the detail. State only what each listing showed on the date viewed. Do not say which is wrong, why it happened, or what it costs them. If either listing, its detail, or its viewing date is blank, reply only with a Needs input list. If either viewing is more than 14 days old, tell me to recheck first. Return two truthful subject options and one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Reopen both listings today. If they now match, do not send.

CATEGORY 02 OF 11 | PART 1 OF 3

# WARM INTRODUCTIONS

R11-09 to R11-16 + R11-82
On this page: R11-09, R11-10, R11-11

## R11-09 Mutual contact introduction

*Use when: Someone you both know agreed that you may use their name.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the mutual contact's full name]; [how and when they said I may use their name]; [why they thought we should talk]
Optional: [approved proof I may cite]; [preferred next action]

Write a first email that names the mutual contact in the first line, gives their stated reason for the connection, and proposes one short first conversation. If permission to use the name is blank or unclear, reply only with a Needs input list and do not draft with the name. Do not put words in the contact's mouth beyond the reason I gave. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm in writing that the contact agreed to be named.

## R11-10 Referral handoff

*Use when: A referrer introduced you by email and you are replying to both people.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the referred person's name and role, plus the referrer's name]
Scenario: [what the referrer said the person needs]; [who is on the thread now]; [whether the referrer asked to stay copied]
Optional: [approved proof I may cite]; [preferred next action]

Write a reply that thanks the referrer in one line, then speaks to the referred person and asks one next-step question about the stated need. If I did not say whether the referrer wants to stay copied, write the email so it works either way and ask me in Sender notes. If the stated need is blank, ask the person what prompted the introduction instead of guessing. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Decide whether the referrer moves to BCC, and check every address on the thread.

## R11-11 Event follow-up

*Use when: You met someone at an event and promised a specific follow-up.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the event name and date]; [one thing we actually discussed]; [the follow-up I promised]
Optional: [approved proof I may cite]; [preferred next action]

Write a follow-up that leads with what I promised and delivers it, then mentions the one real discussion point so they can place me. If I did not confirm I spoke with this person, or the promised follow-up is blank, reply only with a Needs input list. Do not fall back on a generic nice-to-meet-you email. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm you spoke with this person, not a colleague at the same booth.

CATEGORY 02 OF 11 | PART 2 OF 3

# WARM INTRODUCTIONS

R11-09 to R11-16 + R11-82
On this page: R11-12, R11-13, R11-14

## R11-12 Former colleague

*Use when: You are reconnecting with someone you used to work with, for a specific reason.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, and where they work now if I know it]
Scenario: [where and when we worked together]; [one true shared detail]; [why I am writing now]; [the small request]
Optional: [approved proof I may cite]

Write a reconnecting email in a natural voice that uses the one shared detail, says plainly why I am writing now, and makes the small request. Do not assume their current role, employer, or priorities. If I gave none, ask what they are focused on. If the reason for writing is blank, reply only with a Needs input list. Return two truthful subject options and one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check their current role yourself. The draft assumes nothing about it.

## R11-13 Past customer introduction

*Use when: You want a past customer to introduce you to a specific person.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the past customer's name and company]
Scenario: [the work I did for this customer and when]; [the specific person or business I hope to meet]; [what I am allowed to say about the past project]
Optional: [approved proof I may cite]; [preferred next action]

Write an email asking the past customer whether they are comfortable introducing me to the named person. Make declining easy and offer a short note they can forward. If the person I hope to meet is blank, reply only with a Needs input list. Mention the past project only at the level I marked as allowed. If that field is blank, call it the work we did together. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that nothing about the old project is disclosed beyond what the customer approved.

## R11-14 Partner introduction

*Use when: Another business serves the same buyers and you want a first conversation about fit.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the partner's business and what they do]; [the audience we both serve]; [how I came to contact them]
Optional: [approved proof I may cite]; [preferred next action]

Write an email that names the shared audience, gives one narrow reason to talk, and suggests a short call to test fit. Describe the partner only in terms they use publicly or that I supplied. If I gave no shared audience, reply only with a Needs input list. Do not promise referrals, revenue, or exclusivity. Return two truthful subject options and one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Use only descriptions of the partner that they have published or agreed to.

CATEGORY 02 OF 11 | PART 3 OF 3

# WARM INTRODUCTIONS

R11-09 to R11-16 + R11-82
On this page: R11-15, R11-16, R11-82

## R11-15 Community connection

*Use when: You share a real membership or group with the reader.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the group we both belong to]; [whether the group allows members to contact each other about business]; [the shared interest]
Optional: [approved proof I may cite]; [preferred next action]

Write a short email that mentions the shared group once, states my reason for writing, and asks whether a conversation would be welcome. Make no ask beyond that. If I did not confirm the group permits this kind of contact, reply only with a Needs input list. Do not imply we have met or that the group endorses me. Return two truthful subject options and one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Reread the group's rules on member outreach before sending.

## R11-16 Forwardable introduction

*Use when: An introducer agreed to forward a note about you and needs the text.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the introducer's name, and the person they will forward to]
Scenario: [confirmation that the introducer agreed to forward a note]; [who I am and what I do, in one line]; [the reason for the introduction]
Optional: [approved proof I may cite]

Write a short note in the introducer's voice that they can forward as is. It must stand alone: who I am, why the introduction is relevant, and one easy way to respond. Then add one line in my voice to sit above it. If the introducer has not agreed to forward, reply only with a Needs input list. Do not write praise of me in their voice. Return one subject for the forwarded note, the note under 90 words, and my one-line cover message. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Read it as the introducer. Is every sentence something they would say?

## R11-82 Double opt-in request

*Use when: You want to connect two people and need each one to agree first.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the person I am asking first: name, role, and company]
Scenario: [the other party's name, role, and company]; [why I think the two should talk]; [what I may share about each person with the other]
Optional: [approved proof I may cite]; [preferred next action]

Write an email asking the first person whether they are open to an introduction to the second. Give the reason in one or two sentences and make a no as easy as a yes. Say that I am asking the other person separately and will connect them only if both agree. If either name or the reason is blank, reply only with a Needs input list. Do not share contact details or imply the other person has already agreed. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Send the same request to the second person. Connect them only after two yeses.

CATEGORY 03 OF 11 | PART 1 OF 3

# INBOUND RESPONSE

R11-17 to R11-24 + R11-83
On this page: R11-17, R11-18, R11-19

## R11-17 General inquiry

*Use when: Someone wrote in with a question and you know the answer.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, company, and how the inquiry arrived]
Scenario: [the inquiry text, pasted]; [the service it relates to]; [my answer to their clearest question]
Optional: [approved proof I may cite]; [preferred next action]

Write a reply that answers the clearest question in the first two sentences, then gives one next step that follows from what they asked. Do not ask for a call before answering. If I did not supply the answer, reply only with a Needs input list naming the question I must answer. If the inquiry holds several questions, answer the ones I supplied and list the rest in Sender notes. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check the question is answered before any request for a call.

## R11-18 Quote request

*Use when: Someone asked for a price and you either need one more detail or have an approved estimate.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, company, and how the request arrived]
Scenario: [the service requested]; [the scope known so far]; [the one detail still needed to price, or none]; [approved estimate amount and currency, or not approved]
Optional: [approved proof I may cite]; [earliest confirmed availability]

Write a reply that thanks them for the request and restates the scope in one line. If a detail is still needed, ask for that one detail and say what it lets me price. If an estimate is approved and nothing is missing, give the amount and what it covers. Never state, hint at, or give a range for a price that is not marked approved. If the missing detail and the approved amount are both blank, reply only with a Needs input list. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm the missing detail is truly the only one, and that any price is approved.

## R11-19 Service-fit question

*Use when: Someone asked whether you handle a specific kind of work.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [their question, pasted]; [what I actually cover]; [the limits or conditions that apply]
Optional: [approved proof I may cite]; [preferred next action]

Write a reply that opens with a direct yes, a conditional yes with the condition, or a no, based only on the coverage and limits given. Then give the one next step that fits that answer. If the coverage facts do not settle the question, reply only with a Needs input list. Do not soften a no into a maybe, and do not commit beyond the stated limits. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Verify coverage with whoever does the work before you commit.

CATEGORY 03 OF 11 | PART 2 OF 3

# INBOUND RESPONSE

R11-17 to R11-24 + R11-83
On this page: R11-20, R11-21, R11-22

## R11-20 Incomplete inquiry

*Use when: An inquiry is missing the one thing you need before you can help.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the inquiry text, pasted]; [the one prerequisite I need before I can help]
Optional: [approved proof I may cite]; [preferred next action]

Write a reply that reflects back what they have told me so far, then asks for the one missing prerequisite in a single question and says what it will let me do. Check the pasted inquiry first. If it already contains the prerequisite, tell me so instead of asking again. If I listed more than one missing item, ask for the first and put the rest in Sender notes. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Reread their message. Do not ask for something they already sent.

## R11-21 Missed call recap

*Use when: You missed a call and want to make reconnecting easy.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [caller's name, company if known, and their email]
Scenario: [who called and when]; [what I know about why they called, or unknown]; [my confirmed callback windows or booking link]
Optional: [approved proof I may cite]; [preferred next action]

Write a short email that says I missed their call and gives one clear way to reconnect. If the reason is unknown, do not guess it. Invite them to reply with what they need. If I gave no confirmed callback window or link, reply only with a Needs input list. Do not name a time I did not provide. Return two truthful subject options and one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm you are free in every callback window named.

## R11-22 Demo request

*Use when: Someone asked for a demo or walkthrough.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the product or service to be shown]; [the use case they mentioned, or none]; [the booking link or two confirmed time options]; [demo length]
Optional: [approved proof I may cite]; [preferred next action]

Write a reply that confirms what the demo will cover, tied to their use case if given, states its length, and gives one scheduling action. If I gave neither a booking link nor confirmed times, reply only with a Needs input list. If no use case was given, ask one question about what they most want to see instead of assuming. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Open the booking link in a private window and confirm it shows real openings.

CATEGORY 03 OF 11 | PART 3 OF 3

# INBOUND RESPONSE

R11-17 to R11-24 + R11-83
On this page: R11-23, R11-24, R11-83

## R11-23 Urgent request

*Use when: Someone needs work done by a near deadline and you must answer on capacity.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [what they asked for]; [the deadline they stated]; [whether I have confirmed capacity: yes, no, or checking]; [when I will know, if checking]
Optional: [approved proof I may cite]; [preferred next action]

Write a reply that acknowledges the deadline in the first line and gives a straight answer on capacity: yes with the confirmed plan, no, or the exact time I will confirm. If capacity is checking and no confirm-by time is given, reply only with a Needs input list. Never promise the deadline unless capacity is marked yes. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check every date and time against the crew or team schedule before committing.

## R11-24 Out-of-scope inquiry

*Use when: Someone asked for work you do not do.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [what they asked for]; [why it is outside what I do]; [a referral I have verified, or none]

Write a reply that says clearly and kindly, in the first two sentences, that I do not offer this. If a verified referral is given, pass it along in one line. If none, close without one. Do not invent a referral, hint that I might take the work later, or pitch a different service unless I listed one that fits their request. Return two truthful subject options, or keep the thread subject for a reply, and one email under 80 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Confirm any referral is real, current, and willing to take the work.

## R11-83 Qualified inquiry, schedule full

*Use when: A good-fit inquiry arrives while your schedule is full and you have an approved waitlist or next opening.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [what they asked for]; [the approved option: waitlist, next confirmed opening date, or both]; [how the waitlist works, if offered]
Optional: [approved proof I may cite]

Write a reply that says I would like the work, that the schedule is currently full, and gives the approved choice: join the waitlist or take the next confirmed opening. Ask them to reply with the one they prefer. If no option is marked approved, reply only with a Needs input list. Do not invent an opening date, promise a cancellation slot, or use the full schedule as pressure. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Verify the next opening on the live schedule, and add them to the waitlist yourself if they say yes.

CATEGORY 04 OF 11 | PART 1 OF 3

# DISCOVERY AND MEETINGS

R11-25 to R11-32 + R11-84
On this page: R11-25, R11-26, R11-27

## R11-25 Meeting agenda

*Use when: A meeting is booked and you want the purpose and decisions set in advance.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [meeting date, time, and time zone]; [how we are meeting]; [the goal]; [the two or three decisions or questions to cover]

Write a confirmation that restates the time with its time zone and the meeting method, then lists the decisions or questions as a short agenda. Ask whether anything should be added. If the time zone or meeting method is blank, reply only with a Needs input list. Do not add agenda items I did not list. Return two truthful subject options and one email under 120 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check the email against the calendar invitation, including the time zone.

## R11-26 Reschedule

*Use when: A booked meeting has to move.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the original date and time]; [who needs the change, me or them]; [the new confirmed options or booking link]; [the meeting's purpose]

Write a short email that acknowledges the change, offers the new options, and restates the purpose so the meeting keeps its place. If I am the one moving it, say so plainly and apologize once. If no new option is given, reply only with a Needs input list. Do not give a reason for the change that I did not supply. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Hold the new times on your calendar before you offer them.

## R11-27 No-show follow-up

*Use when: A scheduled meeting did not happen and you have not heard why.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the meeting that was scheduled, with date and time]; [the rebooking link or confirmed options]

Write a brief, neutral email saying we missed each other and offering one simple way to rebook. Assume nothing about the cause and do not ask for an explanation. If the rebooking method is blank, reply only with a Needs input list. Keep blame, disappointment, and the phrase no-show out of the email. Return two truthful subject options and one email under 70 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check your inbox, voicemail, and texts first. They may have already reached out.

CATEGORY 04 OF 11 | PART 2 OF 3

# DISCOVERY AND MEETINGS

R11-25 to R11-32 + R11-84
On this page: R11-28, R11-29, R11-30

## R11-28 Discovery recap

*Use when: A discovery call just ended and you want the facts and next steps in writing.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the facts they told me]; [the decisions made]; [each agreed action with its owner and date]; [items still open]

Write a recap that lists what I heard, what was decided, and who owns each agreed action by when. Label open items as open. Ask them to correct anything I got wrong. Do not assign an owner or date that is not in my notes, and do not turn an open item into a commitment. If the agreed actions are blank, recap the facts and ask what the next step should be. Return two truthful subject options and one email under 160 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check each owner and date against your notes from the call.

## R11-29 Missing information

*Use when: You need one item from the buyer before you can move.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the project]; [the specific item I need]; [the decision or step it unlocks]; [how they should send it]

Write a short request for the one item, say exactly what it lets me decide or do, and tell them how to send it. If the item could contain sensitive data and I named no approved way to send it, reply only with a Needs input list. Ask for one item only. Return two truthful subject options and one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
If the item is sensitive, confirm the sending method is one your business has approved.

## R11-30 Stakeholder invitation

*Use when: A decision needs someone who has not been in the conversation yet.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the stakeholder's name and role, and who suggested including them]
Scenario: [meeting purpose, date, and time zone]; [why this role matters to the decision]; [the one contribution I am asking for]; [confirmation that my contact agreed I may share this context]

Write an invitation that explains in two sentences why their role matters to this decision and asks for the one contribution. Mention who suggested including them. If my contact has not agreed to my reaching out or sharing the context, reply only with a Needs input list. Do not summarize private discussions beyond the purpose given. Return two truthful subject options and one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm your main contact knows this invitation is going out.

CATEGORY 04 OF 11 | PART 3 OF 3

# DISCOVERY AND MEETINGS

R11-25 to R11-32 + R11-84
On this page: R11-31, R11-32, R11-84

## R11-31 Promised resource

*Use when: You promised to send something and it is ready.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the resource]; [when and why I promised it]; [whether it is attached or linked, and the link]

Write a short email that delivers the resource, ties it to the point in our conversation where it came up, and points to the part most relevant to them. Add no new request unless one was agreed. If I did not say whether the resource is attached or linked, reply only with a Needs input list. Write attached or linked to match what I told you. You cannot check it. Return two truthful subject options, or keep the thread subject for a reply, and one email under 80 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Open the attachment or link yourself before sending.

## R11-32 Decision timeline

*Use when: The buyer gave you a decision process and you want to confirm it still holds.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the decision process as they described it]; [the last milestone we agreed and its date]; [one dependency on my side, only if confirmed]

Write a short email that asks whether the milestone still holds. If a confirmed dependency is given, state it once as a fact with its date. Keep estimates and commitments separate and label anything unconfirmed as an estimate. If the milestone was never agreed with them, reply only with a Needs input list. Use no pressure language. Return two truthful subject options and one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Mark each date as confirmed or estimated, and remove any you cannot stand behind.

## R11-84 Site visit confirmation

*Use when: A site visit is booked and you need access, attendees, and expectations confirmed in writing.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the on-site contact's name and role]
Scenario: [site address]; [visit date, arrival window, and time zone]; [who is attending from my side]; [who must be present from theirs]; [access needs such as keys, parking, or an escort]; [what the visit will and will not include]

Write a confirmation that lists the address, arrival window, who is coming, who needs to be there, and the access I need. State what the visit covers and that work does not start that day unless I said so. Ask them to confirm access by reply. If the address, arrival window, or access needs are blank, reply only with a Needs input list. Do not ask for entry codes by email unless I said that is approved. Return two truthful subject options and one email under 140 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm the address and arrival window with whoever is driving, and never forward access codes.

CATEGORY 05 OF 11 | PART 1 OF 3

# FOLLOW-UP AND STALLED DEALS

R11-33 to R11-40 + R11-85
On this page: R11-33, R11-34, R11-35

## R11-33 First unanswered follow-up

*Use when: Your first email got no reply and the question in it is still open.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [what my first email asked]; [the date I sent it]; [the decision or question still open]
Optional: [one new fact that helps them answer]

Write a first follow-up that restates the reason for my email in fresh words and puts the open question in a form they can answer in one line, such as yes, no, or not now. Do not paste or repeat the first email. If fewer than three business days have passed since the send date, tell me to wait instead of drafting. If the open question is blank, reply only with a Needs input list. Use no guilt and no bumping language. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Search the whole thread and your other channels for a reply before sending.

## R11-34 Follow-up with new detail

*Use when: Something material changed since you last wrote.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the prior conversation in one line]; [the new detail and its source]; [the decision it affects]
Optional: [approved proof I may cite]; [preferred next action]

Write a follow-up that leads with the new detail and explains in one or two sentences how it changes the decision in front of them. End with one question. If I cannot say which decision the detail affects, reply only with a Needs input list. A detail that changes nothing is not a reason to write. Do not inflate it. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Ask yourself whether the detail would change their decision. If not, do not send.

## R11-35 Missed decision date

*Use when: The buyer named a decision date and it has passed.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the date they said they would decide]; [how and when they told me that date]; [the decision still open]; [what I am holding for them, if anything]

Write a neutral note that mentions the date once, without blame, and asks whether I should keep the proposal or the held time open. Say that a no or a later date is a fine answer. If I cannot say how the date was agreed, reply only with a Needs input list and do not cite a date they never gave. State a consequence only if I supplied a real one. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Find where they gave you that date. If you set it yourself, rewrite.

CATEGORY 05 OF 11 | PART 2 OF 3

# FOLLOW-UP AND STALLED DEALS

R11-33 to R11-40 + R11-85
On this page: R11-36, R11-37, R11-38

## R11-36 Quiet internal review

*Use when: The buyer said the proposal is under internal review and has gone quiet.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [who is reviewing, as they told me]; [the question that is pending]; [one item I could supply to help the review]

Write a short email that offers the one item for their internal review and asks whether it would help. Treat the silence as normal. Do not guess why they are quiet or name reviewers they did not mention. If I have no useful item to offer, reply only with a Needs input list. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 70 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Remove any line that assigns a motive to their silence.

## R11-37 Paused deal

*Use when: The buyer told you the project is on hold.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the reason for the pause in their words]; [the next contact they agreed to, or none]

Write a short acknowledgment of the pause. If they agreed to a next contact, confirm that date and nothing more. If they agreed to none, thank them and leave the next move to them. Do not propose a check-in they did not authorize. If they asked for no further contact, tell me to use R11-99 instead of drafting. Return two truthful subject options, or keep the thread subject for a reply, and one email under 70 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Record the pause and any no-contact request where you track leads.

## R11-38 Requested check-in

*Use when: The buyer asked you to check back at a certain time, and that time has come.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [when they asked me to check back, in their words]; [what we were discussing]; [the one status question]

Write a check-in that opens by tying the message to their request and its timing, then asks one question about current status. If today is earlier than the date they named, tell me to wait. If I cannot quote or paraphrase their request, reply only with a Needs input list. Do not restart the pitch. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 70 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check the date they named against today.

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# FOLLOW-UP AND STALLED DEALS

R11-33 to R11-40 + R11-85
On this page: R11-39, R11-40, R11-85

## R11-39 Low-friction next step

*Use when: A full commitment is blocked and a smaller step would address the blocker.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the blocker they named]; [the smaller step I am approved to offer]; [what the step costs them in time or money]; [how they can undo it]

Write a short email that names the blocker in their words and offers the smaller step, stating what it asks of them and how they can back out. If the step's cost or the way out is blank, reply only with a Needs input list. Do not make the step sound free if it is not. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Time the step yourself. If it takes them more than fifteen minutes, shrink it.

## R11-40 Close the loop

*Use when: Several follow-ups went unanswered and you owe them nothing further.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the thread and its last open question]; [confirmation that I owe them nothing further]; [how they can reach me later]

Write a closing note that says I will stop following up on this, thanks them for their time, and gives one plain way to reopen the conversation whenever it suits them. If I still owe them anything, reply only with a Needs input list naming it. Use no last-chance offer, no deadline, and no question that demands a reply. Return two truthful subject options, or keep the thread subject for a reply, and one email under 70 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Check for anything you still owe them before you close.

## R11-85 Verified change in priority or budget

*Use when: The buyer told you their priority or budget changed and you want to re-engage on those terms.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the change, in the buyer's words]; [when and how they told me]; [the earlier proposal or scope]; [one approved option that fits the new situation, or none]

Write a reply that restates the change as they described it and asks one question to confirm I understood. If an approved option fits, offer it in one or two sentences as something to consider. If none, ask what would be useful now. If the change came from anyone but the buyer, or I cannot say when they told me, reply only with a Needs input list. Do not cut a price or scope that is not marked approved. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm the change came from the buyer directly, and that the option is approved.

CATEGORY 06 OF 11 | PART 1 OF 3

# PROPOSALS AND QUOTES

R11-41 to R11-48 + R11-86
On this page: R11-41, R11-42, R11-43

## R11-41 Quote delivery

*Use when: An approved quote is ready and you are sending it for a decision.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [quote number or version]; [approved scope in one line]; [approved amount, currency, and billing unit]; [attached or linked]; [exactly how to approve]; [quote expiry date, or none]
Optional: [what happens after approval]

Write an email that delivers the quote: name the version, the scope, and the approved amount, say where the document is, and state exactly how to approve. Mention the expiry date only if given. If the amount or scope is not marked approved, reply only with a Needs input list and draft nothing about price. Do not give a start date I did not supply. You cannot see attachments, so remind me in Sender notes to attach and check the file. Return two truthful subject options and one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Match the amount, currency, and version to the actual quote, and attach it.

## R11-42 Proposal for stakeholders

*Use when: A proposal is going to several people who each care about different parts.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [each reader's name and role]
Scenario: [proposal version]; [the decision the group needs to make]; [the two or three sections each role should read]; [where and by when to send questions]

Write an email that leads with the decision the group shares, then points each role to the sections that matter to them in a short list. Close with how and by when to send questions. If the recipient list or the roles are blank, reply only with a Needs input list. Do not summarize pricing in the email unless I asked for it. Return two truthful subject options and one email under 150 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm with your contact that each person on the list should receive the proposal.

## R11-43 Scope clarification

*Use when: The buyer and you may read one part of the scope differently.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [what the approved scope says, quoted]; [the item in question]; [where the scope is documented]

Write an email that states what the approved scope covers, quoting the relevant line, and asks the single question that would settle the unclear item. Keep it neutral. If I did not quote the governing document, reply only with a Needs input list. Do not say the item is included or excluded unless the quoted text says so. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Read the governing document, not your memory of it.

CATEGORY 06 OF 11 | PART 2 OF 3

# PROPOSALS AND QUOTES

R11-41 to R11-48 + R11-86
On this page: R11-44, R11-45, R11-46

## R11-44 Estimate expiry

*Use when: An estimate has a real expiry date that is approaching.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [estimate number]; [expiry date, time, and time zone]; [what actually happens after expiry]; [whether an extension is possible and on what terms]

Write a short reminder that states when the estimate expires and exactly what happens afterward, for example that it will be repriced. If an extension is possible, say how to ask. If the consequence is blank, reply only with a Needs input list. The date must come from the estimate itself. Add no urgency beyond the stated fact. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check the expiry on the estimate itself, and confirm extension terms before offering them.

## R11-45 Proposal revision

*Use when: You are sending a revised proposal and the buyer needs to know what changed.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [old version and new version]; [each approved change]; [why it changed, if they asked for it]; [where the new version is]; [whether the old file or link should be ignored]

Write an email that lists the material changes between the two versions in plain terms and directs them to the new version for review. Say whether the old one is replaced. List only the changes I supplied. If a price changed and the new amount is not marked approved, reply only with a Needs input list. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 120 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Open both versions and confirm the list of changes is complete.

## R11-46 Option comparison

*Use when: The buyer is choosing between two or three approved options.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [each approved option with its price and terms]; [the criteria that matter to this buyer]; [the real tradeoff between the options]

Write an email that compares the options on the same criteria, in the same units, in a short list. If I did not state a recommendation, do not make one. Ask which constraint matters most. If any option lacks a price or uses a different unit, reply only with a Needs input list. Do not favor an option by leaving out its downside. Return two truthful subject options and one email under 170 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that every option uses the same units, period, and terms.

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# PROPOSALS AND QUOTES

R11-41 to R11-48 + R11-86
On this page: R11-47, R11-48, R11-86

## R11-47 Tradeoff explanation

*Use when: A constraint on cost, time, or scope forces a choice the buyer should understand.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the constraint]; [what it does to cost, time, or scope]; [the alternative I can actually deliver]; [whether the alternative is approved]

Write an email that explains the consequence of the constraint in plain language with the real numbers or dates, then offers the alternative if it is approved. Ask which way they want to go. If the alternative is not marked approved, describe the constraint only and add a Needs input list. Do not hide the downside of either path. Return two truthful subject options and one email under 120 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm the team can deliver the alternative on current capacity.

## R11-48 Deposit or kickoff

*Use when: The buyer agreed and one action starts the work, such as a deposit or a signed form.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the agreed deposit amount and currency, or the kickoff action]; [the approved payment or signing method]; [what starts once it is done, and when]; [where the terms are documented]

Write an email that states the exact agreed action, how to complete it, and what begins once it is done. If the amount, method, or governing document is blank, reply only with a Needs input list. Never write bank details, card instructions, or a payment link that I did not paste from the approved source. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Verify payment instructions against the approved source, character by character.

## R11-86 Change order approval

*Use when: Extra work has come up and you need written approval before it begins.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the original scope reference]; [the extra work, described]; [why it is needed]; [approved added cost and currency]; [the effect on schedule]; [how to approve]

Write an email that describes the extra work, why it came up, the added cost, and the schedule effect, and asks for written approval before any of it begins. Say plainly that the original scope continues unchanged and the extra work waits for their answer. If the added cost or schedule effect is not marked approved, reply only with a Needs input list. Do not imply the work has started or that declining affects the original job. Return two truthful subject options and one email under 150 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm no extra work has started, and file their written approval before it does.

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# OBJECTIONS

R11-49 to R11-56 + R11-87
On this page: R11-49, R11-50, R11-51

## R11-49 Price concern

*Use when: The buyer said the price is too high and has not asked for a discount.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [their objection, quoted]; [the approved price and what it covers]; [an approved scope adjustment, or none]

Write a reply that acknowledges the concern in one sentence, then explains what the price covers in concrete terms. If an approved scope adjustment exists, offer it as a way to lower the total. Do not offer a discount. For a discount request, use R11-87. If the approved price or what it covers is blank, reply only with a Needs input list. Do not argue with their budget. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that the price and any scope adjustment are authorized.

## R11-50 Timing concern

*Use when: The buyer said the timing is wrong.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [their timing concern, quoted]; [my real scheduling constraints]; [one option I can deliver, with dates]

Write a reply that addresses the timing they raised and offers one feasible path: a later start, a phased start, or a date to revisit. If I gave no dates I can stand behind, reply only with a Needs input list. Do not argue that now is the best time. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that the proposed dates are open on the schedule.

## R11-51 Existing vendor

*Use when: The buyer said they already have someone for this.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [what they told me about their current vendor or setup]; [a service of mine that complements it, or none]

Write a reply that respects their current arrangement in one sentence. If I listed a complementary service, raise it as one narrow question. If none, thank them and leave the door open without an ask. Make no comparison with their vendor and no claim about that vendor's quality, price, or gaps. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Remove any comparison you cannot prove.

CATEGORY 07 OF 11 | PART 2 OF 3

# OBJECTIONS

R11-49 to R11-56 + R11-87
On this page: R11-52, R11-53, R11-54

## R11-52 Internal capacity

*Use when: The buyer said their team has no time to take this on.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the resource limit they described]; [the scope options I am approved to offer]; [what each option requires from their side, in hours or tasks]; [who does the rest]

Write a reply that offers the smallest approved option and states exactly what it needs from their team and what my side handles. If I cannot state the effort on their side, reply only with a Needs input list. Do not describe the work as effortless. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm who on each side owns each task.

## R11-53 Missing authority

*Use when: Your contact likes the proposal and someone else has to approve it.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [my contact's role]; [the decision required]; [the approver, if my contact named one]

Write a reply that gives my contact a short summary they can forward: what the decision is, what it costs, and what is needed from the approver. Offer to join a conversation if they want me there. Do not address or copy the approver, and do not ask for their contact details. If the decision is not clear enough to summarize, reply only with a Needs input list. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 120 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Ask before copying anyone else. Let your contact carry it.

## R11-54 Skepticism

*Use when: The buyer doubts a claim or doubts the result.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [their concern, quoted]; [the evidence I am approved to share]; [a way they can check it themselves]

Write a reply that takes the concern seriously, answers it with the approved evidence, and offers one way to verify it independently, such as a reference call or a small first job. If I supplied no approved evidence, offer only the verification path and say so in Sender notes. Do not cite numbers, clients, or reviews I did not give. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Delete any proof claim you cannot document today.

CATEGORY 07 OF 11 | PART 3 OF 3

# OBJECTIONS

R11-49 to R11-56 + R11-87
On this page: R11-55, R11-56, R11-87

## R11-55 Competing scope

*Use when: The buyer is comparing your scope with another provider's.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [my scope, itemized]; [the other scope as the buyer described it]; [differences I have confirmed]; [the criterion the buyer cares about]

Write a reply that sets the two scopes side by side using only the supplied terms, notes the confirmed differences without judgment, and asks which differences matter for their decision. Mark anything about the other scope that I have not confirmed as not confirmed, or leave it out. Do not name or criticize the competitor. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 150 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Leave out every competitor detail you learned secondhand.

## R11-56 Polite no

*Use when: The buyer said no.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [their reply, pasted]; [any contact preference they stated]

Write a short reply that acknowledges their answer and thanks them. If they left the door open, say they are welcome to reach out. If they declined further contact, end with no ask and no future check-in. Do not try to reverse the decision or ask why. If they asked to be removed from all contact, tell me to use R11-99. Return two truthful subject options, or keep the thread subject for a reply, and one email under 60 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Record their answer and contact preference right away.

## R11-87 Discount request

*Use when: A buyer asked for a lower price and you must answer within what you are authorized to offer.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [their request, quoted]; [the current approved price]; [the approved concession boundary, or none authorized]; [what I need in exchange, if anything]

Write a reply that thanks them for asking directly. If a concession is authorized, offer one inside the boundary and state what it is tied to, such as a longer term or prepayment. If none is authorized, hold the price, explain what it covers, and offer a scope change only if I listed one. Never exceed the boundary or hint that more is possible. If the boundary field is blank, reply only with a Needs input list. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check the concession against your written limit, and get sign-off for anything beyond it.

CATEGORY 08 OF 11 | PART 1 OF 3

# CLOSING AND HANDOFF

R11-57 to R11-64 + R11-88
On this page: R11-57, R11-58, R11-59

## R11-57 Confirm acceptance

*Use when: The buyer said yes and you want the decision on record.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the version they accepted]; [how and when they accepted]; [the commitments stated in that version]; [the next step and its owner]

Write a confirmation that restates exactly what they accepted, by version, and says what happens next and who does it. Add no term, date, or condition that is not in the accepted version. If their acceptance does not name a version, or more than one version is in circulation, reply only with a Needs input list. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that their acceptance covers the version you name.

## R11-58 Request signature

*Use when: A document is ready for the authorized signer.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the signer's name and role]
Scenario: [the document name and version]; [confirmation that this person is the authorized signer]; [the approved signing method and link]

Write a short request that identifies the document and tells the signer the one action to take and where. If the recipient is not confirmed as the authorized signer, reply only with a Needs input list. Use only the link I pasted, and do not summarize legal terms. Return two truthful subject options and one email under 70 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Verify the signer's authority and test the signing link.

## R11-59 Confirm start date

*Use when: Work has a start date and you want it, and any open prerequisite, in writing.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [start date, time, and time zone]; [whether the date is confirmed or tentative]; [prerequisites still outstanding and who owns each]

Write a confirmation that restates the start date and names the one prerequisite still open, with its owner and due date. If nothing is open, say so. If the date is tentative, the email must say tentative and what would confirm it. If I did not mark it either way, reply only with a Needs input list. Return two truthful subject options and one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Mark the date confirmed only after the crew or team has accepted it.

CATEGORY 08 OF 11 | PART 2 OF 3

# CLOSING AND HANDOFF

R11-57 to R11-64 + R11-88
On this page: R11-60, R11-61, R11-62

## R11-60 Purchase-order follow-up

*Use when: The buyer agreed and you are waiting on a purchase order.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the order or quote reference]; [the PO I am waiting for]; [what I can schedule or process once I have it]; [PO requirements their accounts team gave me]

Write a short request for the PO that cites the reference and explains what I can schedule or process the day it arrives. If I do not know who issues POs there, ask my contact to point me to the right person instead of guessing. Give no start date unless I confirmed one. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm their PO requirements so the first one they send is usable.

## R11-61 Confirm paperwork receipt

*Use when: The customer sent documents and should know what arrived.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [each item I actually received]; [whether it has been reviewed]; [when and how I will next update them]

Write a confirmation that lists exactly what arrived and states the review status in plain terms. Give the next update time if I supplied one. Receipt is not approval. Do not write all set or approved unless I marked the review complete. If something expected is missing, name it as the one open item. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that receipt has not been worded as approval.

## R11-62 Sales-to-service intro

*Use when: The sale is closed and someone else will deliver the work.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the customer contact, plus the new service owner being introduced]
Scenario: [the new owner's name, role, and contact method]; [the agreed scope in one line]; [agreed milestones with dates]; [what the customer should expect first]

Write an introduction that names the new owner and what they handle, summarizes where things stand in three or four lines, and says what will happen first. Share only what suits everyone on the thread, and keep pricing and negotiation history out unless I included them. If the new owner has not accepted, reply only with a Needs input list. Return two truthful subject options and one email under 140 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that nothing in the summary is unsuitable for everyone copied.

CATEGORY 08 OF 11 | PART 3 OF 3

# CLOSING AND HANDOFF

R11-57 to R11-64 + R11-88
On this page: R11-63, R11-64, R11-88

## R11-63 Account setup

*Use when: The customer has one setup step to complete before service can begin.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the person at the customer who should do the step]
Scenario: [the one setup step]; [the approved way to do it]; [the support contact if it fails]

Write a short email that gives the one setup action, step by step if needed, and says where to get help if it fails. Never include passwords, temporary codes, or access links unless I pasted them and marked the method approved. If the right person is not confirmed, reply only with a Needs input list. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Verify the recipient should have this access before sharing it.

## R11-64 Owner handoff

*Use when: The account is moving from one owner to another inside your business.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [outgoing owner]; [incoming owner and contact method]; [the current open action and its due date]; [confirmation that the incoming owner has accepted]

Write a note that says who owns the account now and from what date, and carries the open action forward with its due date so nothing restarts. If the incoming owner has not accepted, reply only with a Needs input list. Do not explain why the change happened unless I gave a reason. Return two truthful subject options and one email under 90 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm internally that the new owner accepted the account and the open action.

## R11-88 Kickoff preparation list

*Use when: Work is confirmed and each side has things to prepare before day one.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [kickoff date, time, and time zone]; [each item the customer prepares, with owner and due date]; [each item my side prepares, with owner and due date]; [where to send questions]

Write a kickoff email with two short lists: what their team prepares and what mine prepares, each line with an owner and a date. End by asking them to confirm their list or flag any item they cannot meet. Include only responsibilities and dates I marked confirmed, and list unconfirmed ones in Sender notes, not in the email. If the kickoff date is blank, reply only with a Needs input list. Return two truthful subject options and one email under 170 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm every owner knows they are named, and every date is on a calendar.

CATEGORY 09 OF 11 | PART 1 OF 3

# RETENTION AND RENEWAL

R11-65 to R11-72 + R11-89
On this page: R11-65, R11-66, R11-67

## R11-65 First check-in

*Use when: Work was recently delivered and you want to know how it went.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the service delivered and the date]; [the one quality question worth asking]; [what I can adjust if the answer is no]

Write a short check-in that asks one concrete question about the work and invites an adjustment if something is off. If I did not confirm the work was delivered, reply only with a Needs input list. Add no upsell, and no survey link unless I supplied one. Return two truthful subject options and one email under 70 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Confirm the work was delivered before asking how it went.

## R11-66 Milestone recap

*Use when: A milestone is complete and the customer should see what was done and what is next.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the milestone completed and its date]; [evidence I can show]; [the next milestone and its date]

Write a recap that states what was completed, points to the evidence, and names the next checkpoint and its date. Describe the work done, not results for their business, unless they reported those results to me. If the evidence is blank, state the milestone without characterizing it. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Cut any claim about their results that they did not give you.

## R11-67 Feedback request

*Use when: You want feedback on one thing you can change.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the specific experience I am asking about]; [the one topic I can act on]

Write a short request with one narrow question the customer can answer in a sentence, and say what I will do with the answer. If I cannot act on the topic, tell me to pick another before drafting. Do not ask for a rating, a review, or a referral in this email. Return two truthful subject options and one email under 70 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Pick a topic you can change within a month.

CATEGORY 09 OF 11 | PART 2 OF 3

# RETENTION AND RENEWAL

R11-65 to R11-72 + R11-89
On this page: R11-68, R11-69, R11-70

## R11-68 Unresolved issue

*Use when: A customer problem is still open and they need an honest status.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the issue as the customer described it]; [what is confirmed about cause and status]; [what is still unknown]; [who owns the next update and when]

Write an update that acknowledges the impact on them, separates what is confirmed from what is still unknown, and states who will update them next and when. Do not promise a fix or a date that is not confirmed. If the update owner or time is blank, reply only with a Needs input list. Return two truthful subject options, or keep the thread subject for a reply, and one email under 110 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Promise the next update, not the fix, until the fix is verified.

## R11-69 Renewal reminder

*Use when: A renewal date is coming and the customer needs the date, the terms, and the one action to take.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [renewal date]; [the terms as written, including price and any change]; [whether it renews automatically]; [the action requested and its deadline]; [how to change or cancel]

Write a reminder that states the renewal date, the terms as written, and whether it renews automatically. Then give the one action requested and its deadline, and tell them how to change or cancel. If the terms or the auto-renewal status are blank, reply only with a Needs input list. Describe a price change as exactly what it is. Return two truthful subject options and one email under 120 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Read the renewal clause in the signed agreement and match the email to it.

## R11-70 Renewal scope change

*Use when: You are proposing a change to scope or price at renewal.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [current scope]; [the proposed change]; [its effect on price and service]; [the effective date]; [the approval needed]

Write an email that describes the proposed change in plain language, shows the before and after for price and service, gives the effective date, and asks for the approval needed. If the new price or effective date is not marked approved, reply only with a Needs input list. Do not present the change as already agreed. Return two truthful subject options and one email under 150 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Verify the revised price and timing with whoever sets them.

CATEGORY 09 OF 11 | PART 3 OF 3

# RETENTION AND RENEWAL

R11-65 to R11-72 + R11-89
On this page: R11-71, R11-72, R11-89

## R11-71 Relevant add-on

*Use when: A current customer told you about a need that an add-on covers.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the current service]; [the need the customer told me about, and when]; [the approved add-on and its price]

Write a short email that ties the add-on to the need they mentioned, states that it is separate from the current service, gives the price, and offers one easy next step. If the need is my guess and not something they said, reply only with a Needs input list. Do not imply the add-on is already included. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Make sure nothing implies the add-on is part of what they already pay for.

## R11-72 Customer win-back

*Use when: A past customer left and something concrete has changed since.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the past service and when it ended]; [why it ended, if known]; [what has concretely changed since]; [confirmation they have not asked me to stop contacting them]

Write a respectful email to a past customer that acknowledges the earlier relationship and states the one concrete change since then. Ask whether it is worth a short conversation. If nothing has changed or their contact eligibility is unconfirmed, reply only with a Needs input list. If I know why it ended, do not gloss over it. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check your do-not-contact list first.

## R11-89 Pending cancellation

*Use when: A customer asked to cancel, or said they are about to, and you need to confirm what they want.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [their cancellation message, quoted]; [the options this customer is eligible for: pause, downgrade, fix, or none]; [the cancellation terms and effective date under the agreement]

Write a reply that acknowledges the request and asks one question to confirm what they want: cancel as stated, or hear the eligible options first. List each eligible option in one line. State how and when cancellation takes effect if they proceed. Offer only options marked eligible. If none, confirm the cancellation steps and stop. Use no guilt, no countdown, and no hurdle between them and cancelling. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 130 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check each option against this customer's eligibility, and process the cancellation promptly if they confirm.

CATEGORY 10 OF 11 | PART 1 OF 3

# REFERRALS AND PARTNERSHIPS

R11-73 to R11-80 + R11-90
On this page: R11-73, R11-74, R11-75

## R11-73 Referral request

*Use when: A satisfied client may know someone who needs the same help.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the work I did for this client and how they said it went]; [the kind of person or business I am looking for]; [the easy way to introduce me]

Write a short ask: does one specific person or type of business come to mind who could use the same help? Offer the easy way to introduce me and make it fine to say no one comes to mind. If the client has an open complaint or unfinished work, tell me not to send this. Offer no reward unless I listed an approved one. Return two truthful subject options and one email under 80 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Send only when the work is finished and the client has said they are satisfied.

## R11-74 Thank-you for introduction

*Use when: Someone introduced you and you want to thank them.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the introducer's name]
Scenario: [who they introduced]; [the update I am cleared to share, or none]

Write a thank-you that names the introduction and shares only the cleared update, in one or two sentences. If no update is cleared, thank them and say only that we are in touch. Do not reveal pricing, problems, or anything the introduced person told me in confidence. Return two truthful subject options, or keep the thread subject for a reply, and one email under 70 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Keep private details of the new conversation out.

## R11-75 Review request

*Use when: The work is complete and you want an honest public review.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the completed service and date]; [the review site I use and its link]; [whether the customer has said they were satisfied]

Write a short request for an honest review of the service, with the link and an estimate of how long it takes. Do not suggest wording, a star rating, or an incentive. If the work is not complete or the link is blank, reply only with a Needs input list. Return two truthful subject options and one email under 70 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Test the link, and remove anything that scripts their praise.

CATEGORY 10 OF 11 | PART 2 OF 3

# REFERRALS AND PARTNERSHIPS

R11-73 to R11-80 + R11-90
On this page: R11-76, R11-77, R11-78

## R11-76 Testimonial permission

*Use when: A customer said something you would like to quote.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the exact words I want to use]; [how I would attribute them: name, title, company]; [where the testimonial would appear]

Write a request for permission that shows the exact text, the attribution, and each place it would appear, and asks for a yes, edits, or a no by reply. Say they can withdraw permission later. Quote their words exactly as supplied and do not polish them. If the text or the placement is blank, reply only with a Needs input list. Return two truthful subject options and one email under 110 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
File their written approval before anything is published.

## R11-77 Partner outreach

*Use when: You have one concrete collaboration to propose to a business you have researched.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the potential partner and what I have verified about them, with source]; [the buyer we both serve]; [the one collaboration I am proposing]

Write a first email to a potential partner that names the buyer we share, proposes the one collaboration in two sentences, and asks whether they are open to discussing it. State only verified facts about their business. If the collaboration is not concrete, reply only with a Needs input list. Include no revenue projections. Return two truthful subject options and one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Verify each statement about their business against its source.

## R11-78 Joint opportunity follow-up

*Use when: You and a partner are pursuing one opportunity and you need their decision or input.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the shared opportunity]; [each party's role as agreed, and where that was agreed]; [the decision or input I need from the partner, and by when]

Write a follow-up that restates each side's agreed role in one line each and asks for the one decision or input needed now, with the date it is needed by. If a role was never agreed in writing, label it proposed and ask them to confirm. Do not commit the partner to anything on their behalf. This is a reply: keep the existing subject, or give two truthful options if it no longer fits. Return one email under 100 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Check that each obligation you name was actually agreed.

CATEGORY 10 OF 11 | PART 3 OF 3

# REFERRALS AND PARTNERSHIPS

R11-73 to R11-80 + R11-90
On this page: R11-79, R11-80, R11-90

## R11-79 Co-marketing proposal

*Use when: You want to propose one small joint marketing project.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the audience overlap and how I know it]; [the one activity proposed]; [what each side would contribute]; [estimated reach and its source, or none]

Write a proposal for one small, defined project: what it is, what each side contributes, and a suggested first step to scope it together. If I supplied a reach figure, label it an estimate and give its source. If not, leave reach out. If contributions are blank, reply only with a Needs input list. Return two truthful subject options and one email under 130 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Label any reach figure as an estimate, with its source.

## R11-80 Referral loop closure

*Use when: An introduction reached an outcome and the referrer should hear how it went.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the referrer's name]
Scenario: [the introduction and who made it]; [the outcome I am permitted to share]; [whether the referred person agreed to this update]

Write a short note that tells the referrer how the introduction turned out, within what I am permitted to share, and thanks them for their part. If the referred person has not agreed to the update, say only that we connected and thank them. Include no fees, terms, or confidential outcomes. Return two truthful subject options, or keep the thread subject for a reply, and one email under 70 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Leave out confidential outcomes and anything the referred person has not cleared.

## R11-90 Case study invitation

*Use when: A satisfied customer may be a good case study and you need explicit consent first.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the work delivered and the results the customer has confirmed]; [what the case study involves: interview length, format, where it is published]; [the review and approval steps before publication]

Write an invitation asking whether they would be open to discussing a case study. State what it involves, that nothing is published without their written approval of the final version, and that they can decline or withdraw at any stage. Mention only results the customer confirmed. If the review steps or publication places are blank, reply only with a Needs input list. Treat a yes as agreement to talk, not consent to publish. Return two truthful subject options and one email under 130 words with one clear next action. Use only the facts above. List anything I must verify under Sender notes, outside the email.

**SENDER REVIEW**
Get written consent before drafting, and written approval of the final text before publishing.

CATEGORY 11 OF 11 | PART 1 OF 3

# REPAIR AND SENSITIVE CONVERSATIONS

R11-91 to R11-99
On this page: R11-91, R11-92, R11-93

## R11-91 Correct a material mistake

*Use when: An email you sent contained a mistake that could change what the reader does.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [everyone who received the earlier message]
Scenario: [the earlier message, its date, and its subject]; [the wrong statement, quoted]; [the verified correct statement and how it was verified]; [who is affected]; [what to do with the earlier message]

Write a correction that states the right information in the first sentence, then quotes what was wrong, says who is affected, and tells readers what to do with the earlier message. Apologize once, briefly. If the correction is not marked verified with its source, reply only with a Needs input list. Do not send a second guess. Do not explain at length or blame anyone. Return two truthful subject options that begin with Correction and one email under 110 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Verify the corrected fact at its source, and send to the same recipients as the original.

## R11-92 Own a missed promise

*Use when: You told a customer you would do something and it did not happen.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the exact commitment and when I made it]; [what happened instead]; [the confirmed recovery action, or the time of my next update]

Write an email that names the commitment I missed in plain words, takes responsibility without excuses, and gives the confirmed recovery action. If no recovery is confirmed, give only the time of the next update. Do not promise a new date that is not confirmed, and do not offer compensation unless I listed an approved one. If the recovery and the update time are both blank, reply only with a Needs input list. Return two truthful subject options, or keep the thread subject for a reply, and one email under 100 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Make sure the new commitment is one you will keep. A second miss costs more.

## R11-93 Advance notice of a delay

*Use when: A commitment will be late and the customer does not know yet.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the commitment affected and its original date]; [the confirmed impact]; [the cause, only if confirmed and shareable]; [when the next update will arrive]; [anything the customer should do meanwhile]

Write a notice that leads with what is delayed and the confirmed impact, then says when they will hear from me next. Include the cause only if I supplied it. If the new date is not confirmed, say it is not yet confirmed and give the update time instead. If the update time is blank, reply only with a Needs input list. Return two truthful subject options, or keep the thread subject for a reply, and one email under 100 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Send before the original date passes, and put the update time on your calendar.

CATEGORY 11 OF 11 | PART 2 OF 3

# REPAIR AND SENSITIVE CONVERSATIONS

R11-91 to R11-99
On this page: R11-94, R11-95, R11-96

## R11-94 Reset unclear expectations

*Use when: The customer seems to expect something the approved scope does not say.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the approved scope, quoted from the agreement]; [what the customer appears to expect]; [the boundary that is unresolved]

Write an email that restates the approved scope from the agreement without blame and names the one boundary that seems unclear. Ask them to confirm their understanding or tell me where it differs. Do not concede or refuse the extra item in this email. If it needs pricing, tell me to use R11-86 next. If the scope is not quoted, reply only with a Needs input list. Return two truthful subject options, or keep the thread subject for a reply, and one email under 120 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Quote the agreement, not your recollection of the sales call.

## R11-95 Duplicate or crossed message

*Use when: Two messages crossed or duplicated and the instructions now conflict.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the messages that crossed, with dates]; [which thread is current]; [the agreed actions that still stand]; [the instruction to ignore]

Write a short note that says which message or thread is current, lists the agreed actions that still stand, and names the instruction to ignore. If I did not say which thread is current, reply only with a Needs input list. Add nothing new. This email only removes the conflict. Send this in the thread that stays current and keep its subject. Return one email under 90 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Reply in the thread you named as current, and stop using the other.

## R11-96 Complaint escalated to the owner

*Use when: A complaint has reached the owner after earlier handling did not resolve it.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the customer's name, and who else is on the thread]
Scenario: [the complaint, in the customer's words]; [how it was handled before, and by whom]; [the assigned escalation owner and contact method]; [what is being investigated and when they will hear back]; [any remedy, marked approved or pending]

Write a reply from the owner that acknowledges the concern and how it was handled earlier, names the person now responsible, and says what is being looked into and when they will hear back. Keep the investigation and the remedy separate. Describe a remedy as offered only if it is marked approved. Otherwise say it is under review. Do not admit fault or assign blame beyond the facts given. If the escalation owner is blank, reply only with a Needs input list. Keep the existing subject. Return one email under 150 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Confirm the escalation owner has accepted the case and the time of the next contact.

CATEGORY 11 OF 11 | PART 3 OF 3

# REPAIR AND SENSITIVE CONVERSATIONS

R11-91 to R11-99
On this page: R11-97, R11-98, R11-99

## R11-97 Verified invoice discrepancy

*Use when: An invoice has a confirmed error or a line under review and the customer needs the next step.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [the billing contact's name and role]
Scenario: [invoice number and date]; [line items confirmed correct]; [line items confirmed wrong, with the correction]; [line items still under review]; [the next billing step and its date]
Optional: [what to do about payment meanwhile]

Write an email that separates the invoice into three short groups: confirmed correct, corrected, and under review. State the next billing step, such as a revised invoice or a credit, and its date. Do not state a corrected total unless every line is resolved. If the next billing step is blank, reply only with a Needs input list. Give payment instructions only if I supplied them. Return two truthful subject options, or keep the thread subject for a reply, and one email under 150 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Reconcile each line against the billing system before sending.

## R11-98 Decline at capacity

*Use when: You are turning down an opportunity because you are at capacity.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name, role, and company]
Scenario: [the opportunity]; [an approved alternative such as a later date or a verified referral, or none]

Write a reply that declines in the first sentence, gives the reason, that I am at capacity, without elaboration, and offers the approved alternative if one exists. Close respectfully. If the alternative is none, close without one. Do not leave the door half open with maybe later unless a later date is approved. Return two truthful subject options, or keep the thread subject for a reply, and one email under 80 words with no sales ask. Use only the facts above. Put internal follow-up under Sender notes, outside the email.

**SENDER REVIEW**
Confirm you are declining, not delaying, and that any referral has agreed to take the call.

## R11-99 Opt-out confirmation

*Use when: Someone asked you to stop contacting them or withdrew a permission they gave.*

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Recipient: [name and the address or number the request came from]
Scenario: [their request, quoted]; [what they opted out of]; [whether a confirmation message is appropriate for this channel: yes or no]; [whether the opt-out is recorded: yes or not yet]

First decide whether to send anything. If a confirmation is not appropriate, return only: No message. Record the opt-out. Otherwise write a two or three sentence confirmation that their request was received and what it covers. Stop rule: the email has no offer, no question, and no request to reconsider. Say the opt-out is complete only if I marked it recorded. Otherwise say it is being processed. Keep the existing subject. Return one email under 50 words with zero sales ask, then a separate Internal update note listing what to change in my records. You have not updated anything, so do not say you did.

**SENDER REVIEW**
Update your list and CRM yourself, then confirm no scheduled emails remain for this person.

REVIEW

# BEFORE YOU SEND

The prompts draft. You verify and send.

### BEFORE YOU SEND ANY DRAFT

- [ ] The recipient and everyone copied belong on this thread.
- [ ] Names, prices, dates, and promises match your source records.
- [ ] The subject says what the email actually says.
- [ ] Every attachment or link is present, correct, and opens.
- [ ] No sentence claims news, proof, familiarity, or urgency you cannot document.
- [ ] There is one clear next action, or none if the situation calls for none.
- [ ] Any opt-out or contact preference on file has been honored.
- [ ] It reads naturally out loud, in your voice.

### WHAT EVERY PROMPT WILL NOT DO

It will not invent results, prior contact, proof, names, commitments, links, attachments, scarcity, or source facts. It cannot send email, update an opt-out, or check an attachment. Those stay with you.

### WHEN IT RETURNS NEEDS INPUT

A fact that changes price, scope, dates, permission, commitments, or the recipient is missing. Supply it and run the prompt again. Do not ask the AI to guess. A Needs input reply is the prompt working as designed.

### THE REST OF THE SET

**Recon11_Sales_Email_Field_Manual_99.pdf** explains the briefs, worked examples, and measurement.
**Recon11_99_Sales_Email_Prompts.xlsx** adds filtering and a results log.
**Recon11_99_Sales_Email_Prompts.md** is the plain-text copy.