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| **Post Discovery Summary Template** |
| **Subject line: [Your Company Name] + [Prospects Company Name]** |
| Hey {{first\_name}},  Thanks for the time on the phone today. As promised, here are the highlights from our conversation:   * [insert highlight 1] * [insert highlight 2] * [insert highlight 3]   So that we are aligned going forward, here are our agreed upon next steps:   * [insert next step 1] * [insert next step 2] * [insert next step 3]   Attached you will find [insert deck, proposal, more info etc].  I will be reaching out on [insert agreed upon date] to answer any questions you have.  Looking forward to hearing from you,  {{Your Name}} |