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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}} |