



Win More Deals at the Prices You Want!



Recap Email Best Practices

Your Objectives

- List the challenges they shared, the objectives they have, and their reasons for needing to address them.
- Highlight who is impacted by those issues and the actions that have been taken to address them.
- Use their language when referencing goals, challenges, objectives using bullet points, so they feel you've truly heard them.
- Never bad-mouth the competition but show empathy to the DI for their current frustrations.
- Share their vision for the project/relationship with your company.

How We Can Help

- Remind them of the differentiators you positioned and why they matter in this circumstance. Correlate the differentiators with their stated objectives.
- Share your sound-byte to establish credibility.
- Without using superlative words like “best” and “expert” (unless it can be proven), explain why your company is the right one for this work given their objectives.
- Create a sense of urgency for the solution.

My Action Items

- List what you committed to doing and by when.

Your Action Items

- List what they committed to doing and by when.

Next Steps

- List the next steps of the process including when, where, and who will be involved.

Note. Whenever possible, use bullet points as it is easier to read. Spell and grammar check the email. Read it out loud to make sure it communicates the desired message.

