DOTS

Draft sales follow-ups with your dot

A useful follow-up shows the customer you listened and makes the next step clear. Let your dot prepare a first draft so you can focus on the relationship and the commitments you are making.

BEFORE YOU START

Use an enabled dot and approved customer information. If you want it to read an email or document, make sure the relevant source is connected and accessible.

Give your dot the facts it needs

1 Share the latest conversation

Provide approved call notes or the relevant email thread, including the latest reply. Identify the customer's priorities, what you agreed to do, and what is still undecided. Include only the details needed for the follow-up.

2 Ask for one clear next step

Name the recipient, purpose, tone, and agreed next step. Ask your dot to flag missing information rather than fill it in.

ADAPT THIS REQUEST

"Use these notes to draft a follow-up email to [name]. Summarize their priorities and the next step we agreed. Keep it warm, direct, and under 150 words. Use only confirmed details. Give me a subject line and one clear question or next step. List any missing information below the draft.

DOTS

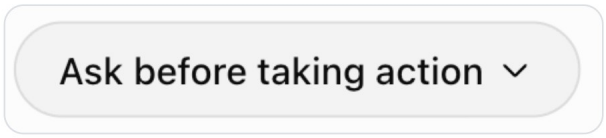
Best practice: Set an email approval rule

Give your dot a persistent instruction to ask before sending email on your behalf.

1. Open your profile in the lower-left corner, then **Settings → Personalization**. Under **Permissions**, select **Custom rules**.
2. Select **Add** and enter: "Always ask for my approval before sending an email on my behalf."



3. Choose **Ask before taking action**, then select **Add rule**.



4. Check that the saved rule appears with **Ask before taking action** selected.

Custom rules are the boundaries you set for your dot. They can allow specific actions, require approval, or block them.

Don't Forget the Human Part!™

- Read the latest reply so you do not repeat a question already answered.
- Check every promise, date, price, and attachment against the source.
- Make the wording sound like you and fit this customer relationship.
- Review the message and its destination before approving it to be sent.

TRY IT **Add an email approval rule, then use one approved set of notes to request a draft. Check the message and its destination before approving it to be sent.**