SALESGENIX PRACTICAL SALES GUIDE

The AI Sales Follow-Up Checklist

A 15-minute workflow for responding faster, staying organized, and creating a better buyer experience without losing the human touch.

FOR SALES LEADERS, OWNERS, AND CUSTOMER-FACING TEAMS

The goal: make every lead feel remembered.

Use this checklist as a team standard. It works whether follow-up is performed manually, assisted by AI, or automated through an approved workflow.

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1. Build the follow-up foundation

Before speed matters, the workflow needs clear ownership, clean data, and permission-aware communication.

Lead intake and ownership

Make sure each new lead enters one visible queue and has one accountable owner.

[ ] Capture name, preferred contact method, source, product or service interest, and the date/time received.

[ ] Assign a named owner and a backup owner for every new lead.

[ ] Record the next action and due time - not just a general status such as 'new' or 'open'.

[ ] Deduplicate repeat inquiries so the customer does not receive conflicting messages.

Consent and communication rules

Respect the channel the lead authorized. AI does not remove consent, disclosure, or opt-out obligations.

[ ] Store the source, timestamp, and wording of any SMS or marketing consent.

[ ] Keep transactional replies separate from promotional outreach when required.

[ ] Honor STOP, unsubscribe, do-not-call, and channel preference requests immediately.

[ ] Use only approved sending numbers, domains, templates, and business identities.

Compliance checkpoint

Do not launch automated texting or calling until the sender, opt-in path, terms, privacy notice, suppression workflow, and human escalation process have been reviewed for the intended use case and jurisdictions.

2. Respond with context, not a template dump

Fast follow-up helps only when the message is relevant, accurate, and easy to answer.

The first response

Aim for a short, specific reply that confirms the inquiry and makes the next step obvious.

[ ] Reference the lead's stated interest, source, or question.

[ ] Identify the business and the person or approved AI assistant responding.

[ ] Answer one useful question before asking for more information.

[ ] Offer one low-friction next step: reply, choose a time, request details, or speak with a person.

[ ] Avoid unsupported promises, invented availability, urgency pressure, or fabricated personalization.

Suggested first-response structure

Use this as a framework, not a script that ignores the customer's message.

[ ] Acknowledge: 'Thanks for reaching out about [specific interest].'

[ ] Help: provide the most useful verified answer available.

[ ] Advance: ask one clear question or offer one scheduling option.

[ ] Control: explain how to reach a person or stop further outreach when applicable.

Human handoff rule

Escalate when the lead is upset, asks for a person, discusses sensitive information, raises a legal or billing issue, requests a firm commitment, or receives an uncertain answer.

3. Run a follow-up cadence people can trust

A cadence should create helpful reminders, not repetitive pressure. Adjust timing to the buyer's request, the sales cycle, and channel rules.

Initial response	Confirm and help	Specific, accurate, one next step
Next business day	Add value	New information - not the same message
2-3 days later	Resolve hesitation	Answer likely question or offer a human
Final active follow-up	Close the loop	Respectful, easy opt-out, no false urgency
Long-term nurture	Stay relevant	Only with appropriate permission and useful content

Every-touch checklist

Before any automated or manual follow-up is sent:

[ ] Is the contact eligible for this message on this channel?

[ ] Does the message use current, verified customer and product information?

[ ] Is there a clear reason for this touch that differs from the previous one?

[ ] Can the customer reply naturally, opt out, or reach a person?

[ ] Will the interaction be logged with outcome and next action?

4. Measure the system - then improve it

Measure outcomes and customer experience, not just activity volume.

Weekly operating review

Review a small set of metrics alongside real conversation samples.

- [ ] Median first-response time by source and business hours.
- [ ] Reply rate, qualified-conversation rate, and appointment rate.
- [ ] Appointment show rate and progression to a defined sales outcome.
- [ ] Opt-out, complaint, delivery-failure, and wrong-contact rates.
- [ ] Human takeover rate, reasons for escalation, and unresolved conversations.
- [ ] A sample of messages for accuracy, tone, relevance, and policy compliance.

Start small

Pilot one channel, one use case, and one accountable team. Define success and stop conditions before increasing message volume or adding automation.

Your 15-minute action plan

- [ ] Choose one lead source to standardize this week.
- [ ] Assign one owner and one response-time target.
- [ ] Write one approved first-response framework and one human handoff rule.
- [ ] Confirm consent, opt-out, suppression, and recordkeeping requirements.
- [ ] Schedule a weekly review of outcomes and message quality.

Want help mapping this checklist to your sales process?

Visit salesgenix.ai/contact and tell us what you want to improve. We will follow up with practical next steps.

Educational resource only. This checklist is not legal advice and does not replace review of applicable contracts, platform rules, or federal, state, local, and industry-specific requirements.