EMAIL TEMPLATE · RESOURCE 08

TL;DR meeting recap

A short, scannable follow-up after a client meeting, so nothing has to be held in memory.

SUBJECT: A QUICK RECAP FROM TODAY, AND WHAT'S NEXT

Hi [Client's name],

Thank you so much for your time today - it's always a pleasure to catch up. I wanted to send a short summary of what we covered, just so it's easy to refer back to.

Here's what we discussed:

1. [Point 1]
2. [Point 2]
3. [Point 3]

And here's what happens next:

- [Next step 1, with owner and rough timing]
- [Next step 2, with owner and rough timing]

No need to action anything before then - just wanted you to have this to hand. Please do reach out anytime if anything's unclear or you'd like to talk it through further.

Speak soon,
[Your name]