

Meeting follow up email template (The CC Note)

Use this template to draft your meeting follow up emails. Make sure you use your own words/language – if the meeting was informal, keep the language informal. Don't add any attachments to your email – if you promised to send them something following the meeting, do this in a separate email.

<p>Step 1 The Opening</p>	<p><i>Dear Tom</i></p> <p><i>Thanks for your time today. I really enjoyed meeting you and finding out more about your upcoming project – it certainly is an exciting time for your company. I thought I'd just capture down the key points we discussed and the actions agreed. Please let me know if I've missed or misunderstood anything.</i></p> <p>The last sentence is critical – it gives control back to the recipient, and opens the lines of engagement.</p>
<p>Step 2 The Discussion</p>	<p><i>We discussed:</i></p> <ul style="list-style-type: none"> - <i>You stated that.....</i> - <i>I shared some ideas....</i> - <i>You discussed....</i> - <i>I raised....</i> <p>Make it clear who said what. Don't include anything confidential. Stick to bullet points if you can.</p>
<p>Step 3 Next Steps</p>	<p><i>We agreed that the next steps are:</i></p> <ul style="list-style-type: none"> - <i>I will.....by Wednesday 5 October.</i> - <i>You will....by Friday 7 October.</i> <p><i>Thanks again Tom, I look forward to speaking to you soon.</i></p> <p><i>Kind regards</i> <i>Keith</i></p> <p>A good meeting in a partner relationship will show actions for BOTH parties. If you're walking away with all the actions, chances are it's not symptomatic of a partner relationship.</p>

Don't forget to send it the SAME DAY as the meeting!