Recap email

The 5-line recap from the Discovery Question Bank, plus the habits that make it work.

01 The 5-line recap

Send it the same day. Write it so your main contact can forward it to their boss without editing.

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Subject: Recap: [the problem, in their words] and next steps

Hi [name], thanks for the time today. Here's what I heard:

1. The problem: [what's broken, in their words]
2. What it costs: [time, money or risk, with their number]
3. How you'll judge a fix: [what they'll measure]
4. Who else is involved: [names and roles, who has to say yes]
5. Next step: [what happens, who does it, and by when]

Did I get anything wrong or miss anything?
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02 Can't fill a line?

That's your next discovery question.

03 Before you leave the call

- ☐ 3–5 next actions, each with an owner and a date, written where everyone can see them
- ☐ The next meeting booked on the spot (send the invite now)

04 The same day

Your champion has to sell this inside while it's fresh. Wait a week and you lose the week.

- ☐ Recap sent
- ☐ A thank-you that moves it forward: one thing you heard, one proof you showed, the next step with a date
- ☐ Champion pack: a summary in their words, a short clip or screenshot of the key moment, the action plan

05 Inside your team

- ☐ 15-minute debrief with your rep: what landed, what missed, what changed
- ☐ CRM updated: the numbers, who owns the budget, the key date, the next step

> **If it isn't in the recap, it didn't happen.** The customer corrects your notes for you, and the people you'll never meet read the problem and the cost first.

Free to share with your team. Please don't resell.