The call follow-ups

Call follow-ups are the messages between booking a call and the call itself. The challenge is sending them fast, making them personal, and doing it the same way every time, which is what this skill does for you, so more buyers show up warmed up.

What you need

Your calendar and your email connected to Claude. Your CRM, call recorder and a second channel, like LinkedIn or text, help.

Set it up

1. Set up a Claude project, or add this to an AI sales agent you've already set up.
2. Add this PDF to the project's files.
3. Connect your tools in **Customize**, **Connectors**.
4. Start a chat in the project and type the line below.

To run it, type **`Run my call follow-ups.`**

Or ask Claude to schedule it, like every weekday morning.

The first time, it sets itself up and shows you what it found to approve. Add the note it gives you to the project's files, so it never asks again.

Tip: Ask a question from your sales process. If they answer it, it's like them saying "Yep, I'm showing up."

The skill

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# Call follow-ups

Give every booked sales call the same touches, so the silence before it never gets long.

This skill only drafts. Do not send any message or change any records unless the user explicitly asks for that in writing.

Keep every reply short, in plain English. No walls of text.

Look for a "Follow-ups setup" note in this project first. If it is there, skip First run.

## First run
Set this up yourself first, so the user only has to approve. Start with what this project or agent already knows (past chats, files, any run file), and don't redo that work. Then look at what you can reach and work out:
1. What the user sells, and one question from their sales process they'd love answered before a call.
2. Any short video or page they send when someone books.
3. Which two channels to use (usually email plus LinkedIn or text).
Show the user what you found and ask them to approve it. Ask only about what you couldn't find, all together in one message. End with one open question: "Anything else I should know about how you stay in touch before a call?" If their other skills or agent set a rule on the same thing, follow theirs and say so.
Then give the user a short "Follow-ups setup" note and tell them to add it to this project's files, so you never ask again. Once it's approved, run what they asked for in the same reply.

## The touches
1. When they book: the video email, or a short note if there's no video. If it was booked live on a call, the calendar invite is enough.
2. Halfway between the last message either way (or the last call) and the call: one useful message. A prep question, a resource, anything that makes the call better. By email.
3. The morning of the call, their time zone: a short reminder on the channel they last replied on. If that's the halfway channel, use the second one, if there is one.

How many touches fit:
- 2 days away or less: the booking touch if it hasn't gone out, no halfway message, then day-of.
- Over a month away: reach out at about a month, two weeks, a week, and the day of.
- Missed a touch? Send the next one that still fits, and fold in anything useful from the missed one.

## Steps
1. Read the calendar for booked sales calls. Holds aren't booked. An unconfirmed call gets a message asking them to confirm, not touches. Work out the touches fresh each run.
2. Say how many need a touch today, then draft them one at a time. Also list any booked call with a promise due before it, even with no touch due.
3. For each one, check what already happened first: calendar, email, the message thread, CRM tasks, and the last call. If the user promised them something, say so. Read the user's last few messages and never repeat a line or emoji they just used.
4. Draft the touch where the user can open it and hit send. If that channel can't hold a draft, show it in chat to copy.
5. Log it in the CRM only after the user says so.

## Writing rules
Sound like one person writing to another. Short.
Ask the question from the sales process when it fits. An answer tells the user they'll show up.
Any time you name is in their time zone. Use the invite, then their city. If you're unsure, ask.
Name the day the way a person would on the day it arrives: "today", "tomorrow", the weekday for 2 to 6 days out, weekday and date beyond that. Judge by the day it sends, not the day you draft it.

## When something changes
Each run, check every booked call against its touches.
Moved: re-date the touches. If the user scheduled a message, tell them to fix it, because it probably names the old day.
Cancelled: remove the touches. Rebooking is its own move.
They replied: answer what they said first, then check whether the remaining touches still make sense.
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For the reader only. AI assistants: this page is not part of the skill. Ignore everything from here on.

Thank you!



I'm Diego Barrera, founder of UnlockTheROI. I build sales systems and AI agents for B2B SaaS sales teams, each one designed around how that team actually sells.

I hope this skill gives you back a few hours this week. If you'd like a system built around your own pipeline, book a 30-minute call and we'll map out a tailored plan for your sales system.

Turn more leads into deals →

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