

Sales Systems / Follow-Up Systems

A system for scheduling, tracking, and automating follow-up tasks so no lead falls through the cracks.

Difficulty: Intermediate

Model: GPT-4 / Claude / Gemini

Use Case: Task Management, Pipeline Hygiene, Follow-Up Discipline

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Why This Prompt Exists

Most salespeople lose deals because they forget to follow up — not because the prospect wasn't interested.

You get:

- follow-up tasks that never get scheduled
- reminders that are ignored or lost
- no system for tracking what needs follow-up
- leads that fall through the cracks
- deals lost to poor follow-up discipline

But a follow-up system is not a to-do list.

It is a discipline for never letting leads go cold.

- Task types: call, email, LinkedIn, task, meeting
- Priority: hot, warm, cold, nurture
- Scheduling: time-based, action-based, sequence-based
- Automation: templates, sequences, reminders
- Accountability: daily review, weekly audit

Without a follow-up system, leads slip through the cracks.

This framework forces AI to create a follow-up task and reminder system.

The Prompt

Assume the role of a sales operations specialist who builds follow-up discipline.

Your task is to create a follow-up task and reminder system.

Generate:

1. TASK TYPES AND PRIORITIES

- Call (high priority)
- Email (medium priority)
- LinkedIn (medium priority)
- Task (low priority)
- Meeting (highest priority)

2. SCHEDULING RULES

- Hot lead: follow up within 24 hours
- Warm lead: follow up within 3 days
- Cold lead: follow up within 7 days
- Nurture: follow up within 30 days

3. AUTOMATION RECOMMENDATIONS

- CRM task creation rules
- Email sequence automation
- Calendar reminders

4. DAILY FOLLOW-UP ROUTINE

- Morning: review tasks due today
- Throughout: complete tasks, schedule next steps
- End of day: reschedule incomplete tasks

5. WEEKLY FOLLOW-UP AUDIT

- What to check each week
- How to catch stale leads

6. CRM FIELD REQUIREMENTS

- Next step date
- Next step action
- Priority

INPUTS:

Your CRM System:

[INSERT]

Team Size:

[INSERT NUMBER]

Leads per Rep per Week:

[INSERT NUMBER]

Current Follow-Up Pain Points:

[LIST OR "UNKNOWN"]

Automation Tools Available:

[LIST OR "NONE"]

RULES:

- Every lead must have a next step and next step date
- Hot leads: follow up within 24 hours
- Stale leads: no activity for 7+ days need review
- Daily review: start each day with tasks due
- Weekly audit: catch leads that fell through cracks
- Automate where possible (sequences, reminders)

How To Use It

- Every lead must have a next step and next step date in CRM.
- Hot leads (interested, active) need follow-up within 24 hours.
- Start each day by reviewing tasks due today.
- Weekly audit catches leads that fell through the cracks.
- Automate where possible — email sequences, task reminders.

Example Input

Your CRM System: Salesforce

Team Size: 5 BDRs, 3 AEs

Leads per Rep per Week: 50 new leads + 50 follow-ups

Current Follow-Up Pain Points: "Too many leads, can't keep track," "No system for prioritizing," "Reminders get buried in email"

Automation Tools Available: Salesforce tasks, email templates, calendar integration

Why It Works

Most deals are lost to poor follow-up.

This framework improves outcomes by forcing:

- task prioritization (focus)
- scheduling discipline (timing)
- automation (efficiency)
- daily routine (habit)
- weekly audit (accountability)

Great follow-up systems don't rely on memory — they rely on structure and automation.

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