



# Follow-up Agent

Monitors which leads have not responded in 5 days and sends a personalised follow-up email automatically.

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## 1 AT A GLANCE

|                         |                                                                              |
|-------------------------|------------------------------------------------------------------------------|
| AREA                    | Sales                                                                        |
| TRIGGER                 | Daily check of your open contacts                                            |
| RESULT                  | Personal follow-up emails from your own inbox                                |
| INTEGRATIONS (EXAMPLES) | <span>Gmail / Outlook</span> <span>Notion / CRM</span> <span>AI model</span> |

## 2 HOW THE WORKFLOW RUNS

- 1 Check daily**  
Once a day the agent checks every lead you have written to who is still open.
- 2 Spot silence**  
It spots leads that have not replied for 5 days. The waiting time can be adjusted.
- 3 Write the follow-up**  
An AI model writes a short, personal follow-up that builds on your first message.
- 4 Send from your inbox**  
The follow-up is sent from your own email address — after your approval if you prefer.
- 5 Track the status**  
Date and status are logged in the CRM. As soon as the lead replies, the sequence stops automatically.

When a lead replies, the sequence stops immediately. Nobody gets endless reminders.

### IDEAL FOR

- ✓ Freelancers and SMEs with many open enquiries or quotes
- ✓ Email-based sales where following up often gets forgotten
- ✓ Teams that want a consistent follow-up routine

### WHAT YOU NEED

- ✓ An email account (e.g. Gmail or Outlook) with API access
- ✓ A list or CRM with your leads
- ✓ A template or examples of your writing style

### CUSTOMISABLE

- ✓ Waiting time before a follow-up and number of reminders
- ✓ Tone, length and language of the messages
- ✓ Automatic sending or approval before each send

### PRIVACY & SECURITY

- ✓ Access only to the emails and contacts needed
- ✓ Sending exclusively through your own account
- ✓ Unsubscribe and stop requests are respected

**YOUR CONTROL** You choose whether follow-ups go out automatically or only after your approval.

This describes the typical process. Every workflow is adapted to your tools, processes and requirements during the project; details and pricing are agreed individually.

### Interested in this workflow?

In a free intro call we look at how the workflow can be adapted to your tools.

[Book an intro call](#)