Call recap email, with two follow-ups

From the free scoping kit by Netling Digital. Guide: How to Scope a Client Software Project. File > Make a copy to edit. Text in [brackets] is for you to fill in.

Subject: Recap of our call about [product name]: please check

Hi [name],

Thanks for your time today. Here is what we heard, so we're both working from the same brief.

1. **What you're building:** [one or two sentences: the product, and who it's for]
2. **Version 1 must-haves:** [list]. **Agreed to wait until later:** [list]
3. **Budget and date:** [band], target [date], because [the reason behind the date]
4. **People:** [name] makes the final decision; [name] is the day-to-day contact
5. **Our assumptions:** [for example: card payments through Stripe only in version 1; one language at launch]
6. **Open questions:** [question] ([who answers it, by when])

If anything here is wrong or missing, reply and we'll correct it. Once you've confirmed it, we'll come back by [date] with [a proposal / a short paid discovery proposal].

Best, [name]

Follow-up 1 (on the agreed decision date, if there's no reply)

Subject: [product name]: one thing that might help

Hi [name], I wanted to check whether you'd had a chance to look at the [proposal / discovery offer]. In the meantime, here's [an answer to one open question / a short example of similar work]. Happy to take questions on a call this week.

Follow-up 2 (a week later)

Subject: Closing the loop on [product name]

Hi [name], I'll assume the timing isn't right and close this on our side for now. If things change, reply to this email and we'll pick it up from the recap. Good luck with the launch.