



Suhas Bhairav

AI Follow-Up Email System

**Practical steps to generate personalized post-call
follow-ups with human review**

Deliver tailored post-call follow-up emails that capture
needs, decisions, commitments, next steps, and
questions with human review.

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Scope & Goals

This guide describes a practical AI-assisted post-call follow-up system for Sales. It emphasizes automation with responsible human oversight.

Key move Start small: pilot one product or territory with a single email template.

PRACTICAL CHECKLIST

- 01** Automate artifacts: needs, decisions, commitments, next steps, and open questions from each call.
- 02** Source data from call notes, transcripts, and CRM records to feed the system.
- 03** Auto-fill CRM fields and draft emails with personalization tokens.
- 04** Route drafts to a human reviewer for pricing, discounts, or strategic terms.
- 05** Schedule follow-up sequences based on outcomes and deadlines.
- 06** Enforce governance: privacy, consent, audit trails, and approvals.
- 07** Assign a clear ownership for Sales Ops and the responsible sales leader.

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What to Automate and What to Review

Clarify automation targets and where human oversight is essential. This reduces misfires and protects strategic terms.

Key move Keep humans in the loop for sensitive terms; never fully auto-send those.

PRACTICAL CHECKLIST

- 01** Inputs: call notes, transcripts, CRM fields, contact data used for drafts.
- 02** Tools: AI agents (e.g., Claude, ChatGPT) with templates and role prompts.
- 03** Data model: fields for needs, decisions, commitments, next steps, and open questions.
- 04** Drafting: generate personalized follow-up emails with placeholders for specifics.
- 05** Review: flag drafts requiring human approval for pricing, concessions, or competitive mentions.
- 06** Security: redact PII, enforce access controls, and maintain action logs.
- 07** Ownership: Sales Ops oversees the workflow and escalation paths.

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Adoption Plan & Metrics

Adopt in weekly increments, starting with one product line for rapid learning. Expand after validation.

Key move Define rollback criteria if quality drops; revert to manual flow.

PRACTICAL CHECKLIST

- 01** Week 1 pilot: test AI drafts against existing templates with one team.
- 02** Week 1-2: connect call notes, transcripts, and CRM to the workflow.
- 03** Week 2: add a CRM field for open questions and decisions.
- 04** Week 3: route drafts to humans for final approval before sending.
- 05** Measure KPIs: email open rate, reply rate, and time to follow-up.
- 06** Assign ownership to Sales Ops and a senior sponsor.
- 07** Guardrails: privacy, audit logs, change control, and rollback plan.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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