

The after-call system

Granola takes the notes and it is connected to my Claude. When the call ends, I run one skill, and by the time I have hung up the follow-up is basically done.

TIME About 20 minutes

YOU NEED A paid Claude plan (Pro or higher) · Granola, or any notetaker that gives you a transcript · Your CRM and task manager (optional)

What you end up with

You hang up, type three words, and before your coffee is cold you have the call graded, the follow-up email drafted in your voice, every promise you made written down word for word, the CRM record current, and the tasks already in your list with the priorities set. You read it and you send it. That part stays yours.

Honest version: this runs on a note taker that was actually in the call. If nothing recorded it, the skill has nothing to read. Setting it up takes about half an hour, and most of that is connecting things.

What you need

- A paid Claude plan, so you can use connectors and skills.
- A note taker in your calls. I use Granola. Anything that gives you a transcript works.
- Your CRM and your task manager, connected if Claude supports them. Anything it cannot reach, the skill writes out for you to paste.
- Two or three follow-up emails you actually sent and were happy with.

What the skill does, in order

- 1 **Grades the call** like a sales psychologist: what I did well, what I missed, where they are in buying, and any pain point I did not dig into.
- 2 **Builds the to-do list** from what was actually said.
- 3 **Does what it can on its own:** the research, a first draft of any document, two times for the next meeting if we did not set one.
- 4 **Logs every promise I made**, word for word, so nothing I said I would send gets forgotten.
- 5 **Writes the follow-up email** and drafts any attachment I promised.
- 6 **Writes the CRM summary**, so their record is current as of this call.
- 7 **Puts every task in my task manager**, with the priority set.

I still read and send the email myself. It does the work. I make the calls.

1. Connect your note taker

Claude > Settings > Connectors > Granola > Connect

Test it before you build anything. Ask: "What were the main points from my last call?" If it cannot answer that, nothing after this step will work either, and you have found the problem in ten seconds instead of after your next call.

2. Connect your CRM and your task manager

Same place, if Claude supports them. Do not skip this step because your CRM is not on the list. A skill that writes the CRM summary out for you to paste is still faster than writing it yourself, and you can connect it properly later without touching the skill.

3. Create the skill

Copy this into a new skill, then change the parts in [brackets] to fit your business. The brackets are the whole job: this is my skill with my business taken out of it.

THE AFTER-CALL SKILL

Name: after-call

When to use: whenever I say "run after-call" or share notes or a transcript from a sales call.

Steps, in order:

1. Pull the notes and transcript for the call from Granola. If there is more than one recent call, ask me which one.
2. GRADE THE CALL. Act as a sales psychologist, not a cheerleader. Give me:
 - a score out of 10, and one line on why
 - two things I did well, quoting what I said
 - two things I could have done better, each with the line I could have used instead
 - where they are in buying: just curious, have a problem, want to solve it, ready to decide
 - any pain point they mentioned that I did not dig into
 - whether they said the problem and what it costs them in their own words
3. TO-DO LIST. Everything that needs to happen next, one line each, with who owns it.
4. DO WHAT YOU CAN. Anything on the list you can do now (research their company, draft a document), do it and show me. If no next meeting was set, suggest two times.
5. PROMISES. Every single thing I said I would send, do or find out, word for word.
6. FOLLOW-UP EMAIL. In my voice: [short, warm, direct, no filler]. Recap what they want, what I am sending, and the one next step. If I promised an attachment, draft it. Never send it.
7. CRM SUMMARY for [my CRM]: who they are, what they need, where they are in buying, the next step and when. Update the contact if it is connected; if not, write it out for me.
8. TASKS into [my task manager]: high if it is a promise or has a date, medium if it moves the deal, low for everything else.

Rules:

- Only use what was actually said on the call. Never invent a detail, a number, a price or a promise.
- If something is unclear, say so and ask me.
- Nothing goes to the client without me reading it first.

4. Teach it your email before you trust it

The email is the part people notice, so give it something real to copy instead of hoping. Paste two or three follow-ups you actually sent into the skill, under a heading that says what good looks like.

ADD THIS TO THE BOTTOM OF THE SKILL

What a good follow-up email looks like:

[paste a real one you sent]

[paste another]

Match the length, the opening line and the sign-off. Never open with "I hope this email finds you well" or "just circling back". One question per email, not three.

5. Run it after your next call

Hang up, open Claude, and type "run after-call". Read the grade first, before the email. The email saves you twenty minutes. The grade is the part that makes you better at the job.

6. The part everyone skips: correcting it out loud

The first few runs will be wrong in small ways. Say what is wrong in plain English and then put the fix in the skill. Real notes I have given mine:

- "Grade me harder on asking questions. I want the line I should have used, not a compliment."
- "My emails are half that length. Three to five sentences."
- "I never say reach out. I say call me or send it over."
- "You listed a promise I did not make. Only things I said word for word."
- "Stop guessing their budget. If they did not say a number, say they did not say a number."

Every note you give it, add to the skill. After about five calls the first draft stops needing edits, and the grade starts telling you the same thing twice, which is how you find out what you actually need to work on.

What goes wrong, and the fix

- It summarizes the wrong call. Name the call and the day. If two calls ran back to back, say which one.
- It invents a price, a date or a headcount. Put "never invent a number, a price or a date, ask me" in the rules and it stops doing it.
- The grade is all praise. Tell it to grade like someone who wants you to get better, and to quote the line you should have used instead. A 10 out of 10 on a call you lost is useless.
- The email sounds like a consultant. It has no example to copy. Paste two real ones in.
- Tasks land with no priority or no date. Tell it what high, medium and low mean in your business, in one line each.
- Nothing comes back at all. The transcript never synced. Open the note taker first and check the call is there.

Before you send

- Read the email out loud. If you would not say it, do not send it.
- Check every promise on the list is one you actually made.
- Check every number against what was said on the call, not against what sounds right.
- Send it yourself. Never give it permission to send.

The twenty minutes of admin is the small win. The real one is that you get graded on every call you take, by something that was in the room and does not care about your feelings.

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