EBR Follow-Up: The Part Everyone Forgets

Episode 14 Companion Download

The EBR isn't over when the meeting ends. It's over when the follow-up creates momentum that drives retention, expansion, and deepens the executive relationship.

The Immediate Follow-Up

Timeline: Immediately after the meeting. Same day, if possible. Next morning at latest.

This is non-negotiable. From *The Executive Business Review Playbook*: send the executive summary and one-pager immediately, tag internal teams with follow-up actions, and within 48 hours, recap to your champion to reinforce alignment. This timing demonstrates reliability and keeps momentum alive when executives are still thinking about what was discussed.

1. **A genuine thank you**
   "Thank you for your time yesterday. We value the partnership and the opportunity to align on priorities for Q2."
2. **A recap framed around THEIR goals**
   Synthesize the meeting into 3-4 key takeaways. Frame the conversation around their goals, their language, their priorities - not your agenda items. Example: "We discussed your progress toward reducing phishing incidents by 40%, the upcoming rollout to your EMEA offices, and alignment of our roadmap with your Q2 security initiatives."
3. **Confirmed action items with WHO, WHAT, WHEN**
   If it doesn't have all three, it's not an action item - it's a wish. Example: "Our team will deliver the updated deployment timeline by March 20. Your team will confirm the EMEA stakeholder list by March 15. We'll schedule a follow-up call for March 27."
4. **Next steps that open the next loop**
   You're not closing the loop - you're opening the next one. Example: "We'll send a formal proposal for the expansion modules by end of week. In the meantime, if any questions come up, I'm available."

The 30-Day Follow-Up Cadence

Strategic CSMs build rhythm, not hope

- **Week 1: Execute on commitments**
  If you said you'd send something by Friday, send it by Thursday. If you committed to a call next week, get it on the calendar this week. Prove you're not just talking - you're doing.
- **Week 2: Manage internal team commitments**
  Your internal team is busy. Unless you're actively managing commitments, they're going to slip. "We committed to delivering the deployment timeline. Where are we on that? Do we have what we need?"

- **Week 3: Re-engage with value (not "checking in")**
  Bring them into the process: "I wanted to share an update on the deployment timeline we discussed. We're on track to deliver by March 20, and I've attached a preview for your review."
- **Week 4: Prepare for the next milestone**
  Always think two steps ahead. Set up the follow-up call, proposal review, or internal alignment meeting for the next phase.

The Executive Summary

Your strategic tool for extending reach beyond meeting attendees

Not everyone who needed to be in the EBR was in the room. The people who weren't there are often the real decision-makers - the CFO, CIO, board members, or advisors who need to approve budget for expansion. Create a one-page executive summary that can be forwarded up the chain.

This is NOT your meeting notes. This is NOT your deck.

This is a standalone document that answers three executive questions:

1. **What did we accomplish?**
   Not what you discussed - what you accomplished. "We aligned on Q2 priorities, confirmed deployment timelines for the EMEA rollout, and identified two expansion opportunities that will be formally proposed by end of month."
2. **What are the next steps?**
   Same format: WHO, WHAT, WHEN.
3. **What do we need from leadership?**
   Be direct: "We need approval for the additional modules by April 1 to stay on track for the Q2 rollout."

Make it easy for your champion to make you look good to their boss. That's how a seven-figure healthcare account turned into a six-figure expansion - one forwardable email.

What NOT to Do

- **Don't oversell in follow-up**
  The EBR was the pitch. Follow-up is about execution and alignment. Pushing new products here kills trust.
- **Don't disappear**
  This pattern destroys otherwise solid CSM careers. Strategic CSMs maintain rhythm - not overbearing, but present. Check in with value, not just "touching base."
- **Don't let action items slip**
  If something will be late, communicate proactively and reset expectations. Don't let it slide.
- **Don't treat follow-up as an afterthought**
  The EBR opens the door. Follow-up keeps it open. This is where the real work happens.

The Tracking System

Strategic CSMs don't hope things get done - they build accountability

After every EBR, maintain a follow-up tracker (spreadsheet, Notion doc, CRM task list). Review it weekly during portfolio planning time - not monthly when you remember.

Action Item	Owner	Due Date	Status

What to Track

- Action items with clear owners and hard dates (not "Q2" or "soon" - actual dates like "March 27")
- Follow-up touchpoints for next 30 days (when will you re-engage? What value will you bring?)
- Next milestones: proposal review, expansion discussion, next EBR
- Customer sentiment: Did they respond positively? Did they engage with action items?

If you're getting radio silence after an EBR, that's a red flag. Something didn't land. Course-correct before the next touchpoint.

Your Action Plan

1. Plan your follow-up BEFORE the EBR meeting happens
2. Send immediate follow-up. Same day, if possible. Next morning at latest.
3. Create one-page executive summary for forwarding up the chain
4. Build your 30-day cadence with value-added touchpoints
5. Maintain weekly tracking of all action items and commitments
6. Monitor sentiment - what's being said AND what's not being said

Next Steps and Resources

This guide is part of the EBR mini-series on ClearPath Conversations:

- **Episode 11:** How to Prepare for Your First EBR Without Burning Out
- **Episode 12:** The Slide-by-Slide EBR Breakdown
- **Episode 13:** How to Present Like You Belong in the Room
- **Episode 14:** EBR Follow-Up: The Part Everyone Forgets

Additional Resources:

- *The Executive Business Review Playbook:* Complete guide to mastering EBRs from preparation to execution
- *ClearPath CX Website:* Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn:* Connect with Mark at linkedin.com/in/markbernardin

Want more CSM frameworks, templates, and tactical resources?
Visit ClearPathCX.com or connect with Mark on LinkedIn at
linkedin.com/in/markbernardin.