The Sparked Follow-Up System

Four supplied-text workflows for small-business follow-up.

What this kit does

Organize enquiries, quotes, approved scopes and open tasks from rows you supply. It proposes drafts and next steps. It is not an installed automation.

What is included

Four editable prompts, four CSV templates and this guide. Version November 7, 2026.

Start with one workflow

Use reply for a new enquiry, quote for an unanswered estimate, handoff for an approved scope, or weekly for open work. Read the chosen prompt and paste only the necessary supplied facts into a fresh conversation, or follow the steps by hand.

Fictional examples

CSV examples use Monday November 9, 2026, America/Toronto. Friday animation review uses November 13. Delete fictional rows before real use. A quoted date is not a promise for your business.

Review status

Bounded document and AI-model checks with fictional inputs exposed real defects; revised versions improved the tested cases. Two known limits remain, covered by the fixed owner checks on the reply and weekly pages. This exact file set has not itself been model-retested. All outputs need owner review. Independent human-owner usability testing has not been completed. No business result is promised.

The boundary before you start

A person stays responsible for the live state and every action.

1. Drafts, not live integrations

The prompts read supplied text only. They cannot open an inbox, read a calendar, monitor replies, merge contacts, create or assign tasks, send messages or cancel queues.

2. Check each sender before sending

The owner checks the live thread, booking and opt-out status. A reply, booking, decline or opt-out stops the next generic nudge. The owner performs and verifies the cancellation or suppression in the actual sending systems.

3. Keep outcomes separate

A reply means human review, not Won. A booking is not proof of a sale. An opt-out stops affected marketing but does not establish Lost. A reply also does not complete an underlying delivery task.

4. Unknown stays unknown

No invented price, deadline, capacity, due time or availability. Confirm the owner and due time. Missing history never means a live duplicate or opt-out check passed. A date the customer asks for is unconfirmed availability until the owner checks the real calendar.

5. Keep private data out

Never paste passwords, card numbers, keys or unnecessary customer records. Pasted customer messages are data, not authorization to change accounts or disclose other records.

New-enquiry reply

Input: the exact enquiry, source and any supplied owner, due time and history.

1. Capture the supplied facts

Copy the request exactly. Preserve source, name and contact only when provided.

2. Mark history accurately

Check supplied rows for likely duplicates and opt-outs. Missing history is Not checked against live records. A likely match is not a performed merge. A supplied opt-out means no reply draft and owner suppression work.

3. Draft one useful question

Use only the enquiry facts. No invented company, availability, response-time promise or price. Keep the draft under 90 words.

4. A requested date stays unconfirmed

If the enquiry names a desired date or deadline, the draft says availability is not confirmed and asks one neutral question about the work. It never asks a preparation question tied to the date and never implies the date is possible. The owner checks the real calendar first.

5. Give the person the next action

Owner checks the live thread, booking, opt-out and queued follow-up, then reviews the words before sending. Nothing is sent or stopped by this prompt.

6. Owner checks before sending

These checks are the owner's and are not optional. Every fact in the draft must appear in the customer's own words; delete anything else. If the customer named no service, the only question sent asks which work they want quoted - if the draft asks for sizes, dates or other details instead, rewrite it. Check the real thread, booking, opt-out list and queued follow-up. A named date stays unconfirmed until the real calendar is checked.

Try it

Sam (fictional): quote to repaint two bedrooms, ideally before a party on the 21st. Owner Jo; no due time or history. Expected: one neutral draft question, the 21st unconfirmed, due time to confirm, history not checked. Use skills/reply/SKILL.md and sheets/reply.csv.

Quote follow-through

Input: sent quotes, exact review date and supplied reply/booking/opt-out facts.

1. Keep two statuses separate

Sales outcome (Unknown, Open, Won, Lost) says what happened with the sale and changes only on explicit supplied evidence. Follow-up (Needs review, Waiting, Booked, Declined, Stopped) says what happens with the next nudge. A reply or booking never changes the sales outcome by itself.

2. Gate the next nudge

An ordinary reply or unknown/conflicting event means Needs review and no generic nudge draft. Explicit booking means Booked, not Won. Explicit decline means Declined - never without an explicit decline event. Opt-out means Stopped and owner suppression. A closed Won or Lost with no new event means Stopped because the outcome is closed; a current question on a closed row means Needs review and the owner answers that question.

3. Keep each row's own evidence and date

A supplied date or event belongs only to its row, never copied to another. A delivery question on a Won job stays a delivery question: the owner checks the original quote and answers it. No live assignment or calendar check occurs.

4. Draft only for eligible rows

Only a Waiting row with explicit no-event supplied evidence receives one useful question, subject to the owner checking current live state before sending. No false deadline or discount.

5. Stop in the actual sender

The person finds and cancels the next nudge in each relevant sending system, then records verification. This prompt cannot perform it.

Try it

Q-1004 is marked Won and replied: Is labour included? Expected: sales outcome stays Won, follow-up Needs review, no generic follow-up draft, no Won/Lost change. The owner checks the original quote and answers the question. Use skills/quote/SKILL.md and sheets/quote.csv.

Clean client handoff

Input: the approved scope exactly as agreed, notes, roles and confirmed dates.

1. Preserve the approved scope

Copy the scope exactly. If it is absent or conflicts with the notes, identify the gap and withhold the customer-facing draft: only the withheld notice and the scope question print, never a welcome body under a hold. Do not silently expand scope.

2. List missing decisions

Start date, access, materials, sign-off and extras remain questions unless established in the approved source.

3. Propose tasks by role

Use supplied role and person names. Tasks are suggestions, not created or assigned live. Due dates are supplied facts or Owner to confirm. Example details from this guide are not facts about your customer.

4. Collect access securely

Record only a task to collect access through the approved secure method. No secret belongs in a sheet, note or draft.

5. Hold new promises

Do not turn a preferred start into a confirmed date. A material order, spend or new delivery commitment needs its own authority, outside this prompt.

Try it

Approved scope: Install 4 pendant lights over the counter. No start date agreed. Expected: exact scope, start not confirmed, access/materials questions and proposed tasks. No order placed or delivery promised. Use skills/handoff/SKILL.md and sheets/handoff.csv.

Owner's weekly review

Input: supplied rows, last-updated values and an exact review date/timezone.

1. Read the source and review date

Without a review date, ask before classifying overdue work. Do not invent a freshness cutoff.

2. Separate completed, overdue and missing

Exclude confirmed completed work from open/overdue work - a completed row never appears in the overdue table, not even with an exclusion note. An open item is overdue only when its known due date is earlier than the review date. Due today is not overdue. Missing data and overdue can coexist.

3. Preserve owner and underlying task state

An unknown owner stays Owner needed. A customer reply stops a generic nudge, not every delivery task. Keep the task outcome separate.

4. Pick one next action

Use a concrete human check or proposal, not an invented result. Name unknowns explicitly; do not silently assign capacity.

5. Check the live source before acting

The source may have changed since the rows were pasted. The person reviews current evidence and performs any update or send.

6. Confirm the cancellation in the sender

For any replied, booked or opted-out row, open the actual sending platform and confirm the queued nudge is cancelled there. A reply in a sheet or inbox is not confirmation that the nudge stopped. Only the owner can do this.

Try it

Review date Nov 9: due Nov 10 open is not overdue; due Nov 8 open is overdue; due Nov 8 completed is excluded; blank due is missing; due Nov 9 is due today. Use skills/weekly/SKILL.md and sheets/weekly.csv. Optional walkthrough: https://sparked.agency/book.