



FINBYZ TECH PVT LTD

“STEER **YOUR**  
VISION”

## FOLLOW UP BUDDY

**Statement of confidentiality:**

This document is a strictly confidential communication to and solely for the use of recipient and may not be reproduced or circulated without FinByz Tech Pvt. Ltd.'s prior written consent. You may not disclose the information in this document in any way.

## Overview

The **Lead Follow-Up AI Tool** streamlines the sales follow-up process by automatically identifying inactive opportunities, analysing customer context, and generating personalized follow-up emails with AI. It ensures that every lead is nurtured on time, eliminating the need for manual effort from the sales team.

## Workflow Steps

### 1. Identify Stale Opportunities

Automatically detects leads and opportunities with no customer response for more than 5 days.

### 2. Retrieve Customer & Lead Information

Fetches contact details and company profiles directly from ERPNext.

### 3. AI-Powered Research

Enriches lead data with company updates, industry trends, and relevant insights.

### 4. Context

### Storage

Saves research summaries and customer insights for quick reference in future follow-ups.

### 5. Analyse Previous Communication

Reviews past follow-up emails to understand tone, style, and customer engagement patterns.

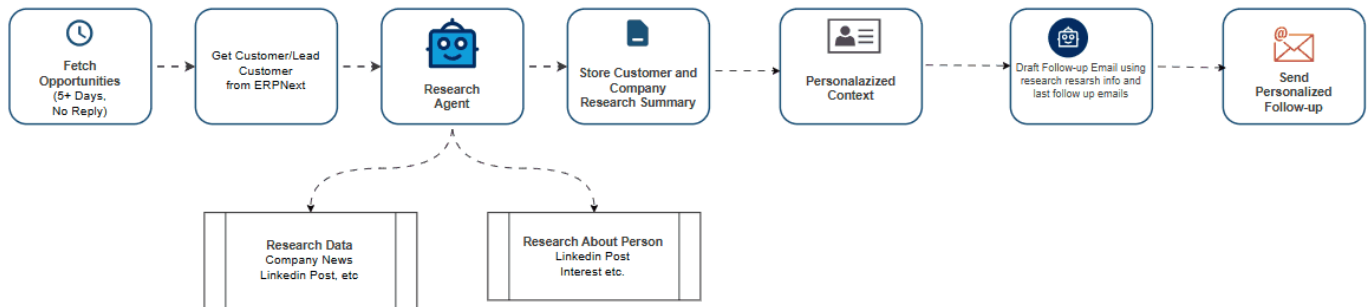
### 6. Generate Personalized Follow-Up Email

Uses AI to draft tailored emails that combine research insights with past communication history.

### Send Automated Follow-Up

Delivers the email automatically, ensuring timely, consistent, and effective communication

## Follow Up Buddy



## Benefits

- **Saves Time** – Automates repetitive follow-ups, freeing up sales teams for high-value tasks.
- **Boosts Response Rates** – Increases engagement with personalized, context-aware communication.
- **Never Miss a Lead** – Ensures every opportunity is nurtured on time.
- **Strengthens Customer Relationships** – Maintains consistent, timely outreach to build trust and loyalty.