

SOP: Task Audit Follow-Up Email Generation

Purpose

Convert a completed Task Audit PDF into a concise, personalized follow-up email that identifies clear delegation opportunities and guides the prospect toward a discovery call.

Inputs Required

- Task Audit PDF report (required)
- Optional AI-generated summary (reference only, never reuse language)
- Copy/paste Task Audit results content
- Booking link (default: www.freedom-makers.com/get-started-here)

Core Objective

Produce a short, natural, ready-to-send email that highlights a small number of high-value delegation opportunities using specific, execution-level examples.

Discovery Team Member Process Steps

- Access the lead's record in ScoreApp
 - Locate the correct lead and open their Task Audit results
 - Click 3 dots, "print," Download the Task Audit PDF to your computer
 - Open lead results page and copy content
- Review context before generating
 - Optional: review AI-generated summary for general understanding only
- Generate the email in GPT
 - Open the GPT
 - Upload the Task Audit PDF
 - Paste results content
 - Generate the email
- Review and refine the output
 - Read the email fully and make any appropriate edits
 - Ensure the examples are specific and clearly tied to the audit
 - Adjust wording so it sounds truly human, not templated (reading it out loud helps)
 - Remove or tighten anything that feels vague or generic
 - Confirm tone aligns with FMVS voice
- Validate required elements
 - Check that 3–4 delegation examples are included
 - Confirm any leader-owned tasks are clearly acknowledged using direct phrasing
 - Ensure no over-explaining or listing of all audit results

- Verify the booking link is included and correct
- Finalize and send
 - Copy the email into your email platform
 - Add recipient and subject line
 - Do a final quick read for flow and clarity
 - Send the email

GPT Process Steps

- 1. Reviews Audit Data**
- 2. Identifies Key Insights**
- 3. Selects Delegation Examples**
- 4. Drafts the Email**

GPT Instructions:

Write a single email using this flow:

- Acknowledge completion of the audit
- Share 1–2 insights based on patterns
- Provide concrete examples of support (task-level detail)
- Acknowledge leader-owned tasks using exact phrasing
- Include a soft, direct CTA with the booking link

Email Requirements

Length -100–150 words preferred

Tone - Consultative and grounded, Warm but not casual, Professional without sounding polished or sales-driven

Content Rules

- No bullet points
- No em dashes
- No generic or filler language
- No exaggerated emotional language
- No vague statements or incomplete references
- No assumptions beyond the audit data
- No listing of all audit results
- No explanation of scoring or methodology

Language Standards: Use specific, execution-level phrasing, Replace general terms with real actions

Example:

Avoid: calendar management

Use: rescheduling client calls, confirming availability, and managing follow-ups in Google Calendar

Leader-Owned Tasks Must use explicit phrasing:

“I also noted you are not interested in delegating [task] at this time”

Do not justify or reinterpret