

Sales brief / Fictional example

For a small-business owner preparing an existing prospect conversation.

Full prompt and fictional input

Prepare a short meeting brief using only Sources A, B, and C. Return five factual bullets with a source label for each, three meeting questions, a missing-information table, and a short follow-up email draft for human review. Preserve exact dates and times. Do not invent a budget, a person's name, an agreed price, a purchase decision, or a promised result. Do not contact anyone or update a system.

Fictional training example. No real customer, prospect, or sales opportunity.

Account: Example Maintenance Co.

Source A, note dated October 28, 2026: The office manager said email service requests get lost. There are three office staff. They want a shared request list. Budget was not discussed.

Source B, note dated October 30, 2026: A demonstration is booked for November 4 at 10 a.m. Pacific. The office manager wants to see duplicate-request handling. A technician may join, but no name is confirmed.

Source C, internal draft: A possible offer is an intake workflow. Pricing is undecided. No contract or purchase has been agreed.

Review checklist

- [] Compare every factual bullet with its labeled source.
- [] Confirm the meeting date, time, and time zone.
- [] Keep an unknown budget and undecided price visible.
- [] Do not infer a purchase decision or a confirmed unnamed attendee.
- [] Review the email draft before using it. Nothing is sent by this example.

A meeting brief helps you prepare questions. It does not establish a sale, an agreed price, or customer permission.