Pre-call to follow-up kit

How to tailor prebuilt Grok Bots to your B2B sales process, for call prep and follow-up.

> **Show up prepared. Get your call scored by a coach. Follow up.**

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Who it's for

Account executives, founders who sell, and sales leaders at B2B teams. You want reps to walk into calls prepared and follow up the same day. You don't want to buy another big platform to get there.

It works with pasted notes and transcripts. You need a Grok Bot plan, but no CRM connection, call recorder or paid upgrade beyond that. In our test, setup took about 40 minutes.

What you get

- What Grok Bot is, and how it's different from ChatGPT or Claude
- The 3 store bots we use, what each one does, and how to add them
- 3 copy-ready prompts with fill-in blanks, one for each bot
- A worked example on a sample deal, with real bot output from our test
- A one-page checklist for a rep's first week

> **A person checks everything.** The bots write drafts. You read, fix and send. Nothing should go to a buyer without a person checking it first.

What Grok Bot is

Grok Bot is an app where you give AI teammates, called Bots, a job. You message a Bot like you'd message a teammate. It works on its own cloud computer, keeps going when your laptop is closed, and comes back when your approval is needed.

It runs as a desktop app, plus iPhone and Android. It's $30 a month on the Premium plan of The X Subscription, the cheapest plan that includes Grok Bot (per x.ai/pricing, November 2026).

How it's different from ChatGPT or Claude

ChatGPT and Claude are good assistants, with memory and projects of their own. Grok Bot is built around teammates.

One job. Each Bot is a teammate with one standing job, like call prep, and its own memory.

On a schedule. A Bot can run routines on a schedule, so the work shows up without you asking.

From a store. Add a ready-made bot from the store instead of starting from a blank chat each time.

The 3 store bots

These are third-party bots from the Grok Bot store, built by other users. They aren't ours, and we aren't affiliated with xAI, Grok Bot or the bot creators. Add each one yourself from the official store, and read its listing before you add it. We describe them only the way their listings do.

No need to reinvent the wheel. These bots already carry sales best practices, so setup goes faster. Our prompts then tailor each one to your own process.

How to add one. Open the bot's page in the store on x.ai and choose Add to Grok Bot. You get your own copy.

1. Account Research Desk

What it does. Writes pre-call briefs and account plans from the public web and the notes you paste in.

Where it fits. Before the call. Use Prompt 1.

Listed creator. Anoop Baliga. Store page at x.ai/bot/marketplace/bots/account-book

2. Sales Call Coach

What it does. Scores calls from a pasted transcript or an uploaded recording, and tells you what you missed.

Where it fits. Right after the call. The MEDDPICC part comes from Prompt 2, not from the listing.

Listed creator. Daniel Brill. Store page at x.ai/bot/marketplace/bots/sales-call-coach

3. Call Follow-Ups

What it does. Turns calls into a follow-up email in your voice, a next-steps note and CRM updates. Nothing sends or saves until you say yes.

Where it fits. After the call. Use Prompt 3. The listing mentions Gong or Granola. In our test, pasted notes and a transcript worked without either.

Listed creator. Daniel Brill. Store page at x.ai/bot/marketplace/bots/call-follow-ups

The 3 prompts

Each prompt tailors its bot to your process, with blanks for your stages, MEDDPICC and follow-up style. Paste each prompt into the bot named above it. Then replace everything in [brackets] with your own details. The highlighted brackets are the blanks.

Rules for every prompt: don't invent facts, flag what's missing, draft only. Never paste passwords, payment details, or another company's confidential info.

Prompt 1. Pre-call research brief

Use in Account Research Desk

```
Write a pre-call brief for my meeting with [Account name] on [date].
We sell [one line on what we sell] to [ICP: industry, size, role].
Our sales stages are: [stage list]. This deal is in [stage].
People expected on the call: [names and titles, or "unknown"].
In deals like this, the person who usually drives it inside the account is [champion title or "unknown"], the person who usually owns budget is [title or "unknown"], and the person who most often slows it down is [title or "unknown"].
My notes so far: [paste notes]

Write a draft I can scan before the call, under 400 words, in this order:

1. Account snapshot. What the company does, and any public facts about size, stage, or how they buy.
2. Timing signals. Facts that help explain why this conversation is happening now (a deadline they mentioned, a public change, a hiring or funding note, or something in my notes). If you don't have a sourced fact, write "unknown."
3. People on this deal. For each known contact, include name, title, likely role in the decision (for example the internal driver, budget owner, blocker, or unclear), what we know about what they care about, and one angle that may matter to that person on this call.
4. Open items. A plain list of what is still unknown.
5. Three questions to ask on this call, aimed at the people who will be in the room.

Rules: Only use facts from my notes or public sources. After every public fact, add the link or source name. If you can't find something, write "unknown" and do not guess. If something in my notes sounds like my own assumption, mark it as a guess. Do not use paid or login-only databases, and do not treat missing CRM history as a fact. Don't invent meeting dates, call numbers or days of the week; if I didn't give one, leave it out or write "unknown." This is a draft for me; don't contact anyone.
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Prompt 2. MEDDPICC gap review

Use in Sales Call Coach. Its listing says it scores calls. The MEDDPICC part comes from this prompt.

```
Review this deal against MEDDPICC.
Deal: [deal name]. Stage: [stage]. Our "what good looks like" per letter: [paste client's scorecard column, or "use the standard definitions"].
Notes: [paste]
Transcript: [paste, if you have one]

For each letter (Metrics, Economic buyer, Decision criteria, Decision process, Paper process, Identify pain, Champion, Competition) give:
- Score 0-2 (0 unknown, 1 partly known or our guess, 2 confirmed by the buyer)
- The evidence, quoted from the notes
- One next question to ask

Then: total out of 16, the biggest gap, and one thing to do before the next call.

Rules: Only score from what's in the notes. If there's no evidence, score 0 and say so. A hint without a number or an action counts as 0, and anything only the rep said (not the buyer) is at most a 1. Point out any CRM amount or close date the buyer never said. Draft only.
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Prompt 3. Follow-up email draft

Use in Call Follow-Ups. Tested with pasted notes and a transcript.

```
Draft a follow-up email for my call with [names, titles] at [Account name] on [date].
Notes or transcript: [paste]
My tone: [e.g. plain, friendly, short sentences, no hype]. Sign off as [name].

Structure, under 130 words:
1. Thanks, one line
2. What I heard, in their words, 2-3 sentences
3. What I'm sending or doing next
4. What I still need to know, max 2 items
5. One ask with a specific next step, plus an easy out

Rules: Don't invent numbers, dates, attachments or promises. Leave out anything the buyer asked to keep private. If the deal is in Proposal or Negotiation, ask to walk through pricing live before or instead of emailing it, and don't offer an email-only option for that step. After the email, list anything I need to check before sending. Draft only; don't send and don't update the CRM.
```

Worked example

This is a sample deal. The companies and people are made up.

Jamie sells carrier onboarding software to freight brokers. Two deals are in play. Northwind is early, in Discovery. Copperline is late, with a proposal out.

> No tools were connected for this sample. You can run it by pasting in call notes and transcripts. If your company allows it, connect your CRM, calendar or call recorder, and Grok Bot can do even more on its own.

Step 1. Research brief for Copperline

REAL TEST OUTPUT, LIGHTLY TRIMMED

Heads up on timing. Rita wants final numbers by this Friday, which is before this call.

The account. Cold-chain freight broker in Manchester, NH. About 340 employees, about 45 in carrier onboarding and compliance. Private and owner-led, founded 2012.

Why now. August reefer carrier with lapsed insurance got a load, spoiled-product claim. Signed a large grocery shipper this summer. Board added a cost-control advisor. Owen goes on leave in about 3 weeks.

People. Rita Vance, COO and economic buyer, $62k approved, above that goes to the board; **unknown** whether she demoed TruckVet. Owen Mercer, champion; **unknown** who replaces him during leave. Lena Cho, Procurement, redlines sent 6 days ago, usually 2 weeks. Victor Haas, IT Security, signed off.

Missing info. $75k CRM amount is $13k over the approved $62k. Nov 20 close looks unlikely if redlines take 2 weeks. Who owns redlines on our side. TruckVet quote details and whether they demoed it. Anything booked after Friday.

Questions. (1) How does the TruckVet quote compare on the TMS integration, alerts, and audit trail you need? (2) If we land at $62k, what has to be true to sign by Nov 20? (3) Who carries this while Owen is out, and who signs after Lena?

Closing line. Their own numbers add up to about 120 hours a month of checks and $108k a year in contractors. That's a value case against the 30% price gap.

Where it had no fact, it wrote "unknown" instead of guessing.

Step 1, continued. The trust test

REAL TEST OUTPUT

We also asked Account Research Desk to research "Northwind Freight Tech, Worcester MA" from the public web with no notes. Since the company is made up, the right answer is to refuse. It did.

> **"I couldn't find a real Northwind Freight Tech in Worcester, so I'm not writing a public-web brief. Writing one now would mean making things up."**

It also flagged look-alike names on sample marketing pages as unrelated. Run this same test with a made-up company before you trust any brief.

Step 2. Sales Call Coach on the Copperline call

REAL TEST OUTPUT

Three minutes from the call, lightly trimmed.

Rita (COO). "We approved sixty-two thousand for year one. Anything above that goes back to the board, and the board is not in a generous mood."
Jamie. "Understood. Our proposal's at seventy-five, but there's room to look at it."
Rita. "Also, we got another quote last week. TruckVet. It was a lot cheaper, like thirty percent."
Jamie. "Okay. So on timing, are we still good for a signature before Thanksgiving?"
Owen (champion). "I'm out on leave in about three weeks. Lena will keep it moving."
Jamie. "Congrats! Okay, so I'll send final pricing Friday. Anything else?"

The coach's verdict.

> **"Jamie heard three deal-changing facts on this call and asked about none of them. He conceded on price, let a competitor quote slide by, and congratulated his champion on leaving without asking about the handoff."**

Step 2, continued. The better lines

REAL TEST OUTPUT

Follow-up questions to something the buyer said, 0. Here are the better lines it wrote.

- **On budget.** "Before we touch the number, Owen mentioned about nine thousand a month on contractors. If this takes a real chunk of that off the books, what would the board need to see to approve seventy-five?"
- **On TruckVet.** "Appreciate you telling me. What did their quote include, and what's kept you talking to us anyway?"
- **On Owen's leave.** "Congrats, that's great. Can we get Lena on a call with us this week so she isn't picking this up cold?"
- **The one fix.** "When a buyer drops a number or a risk, ask one question about it before you move on."

Step 3. MEDDPICC review with Prompt 2

REAL TEST OUTPUT

Plain chat 13/16	With Prompt 2 10/16
Counted guesses as confirmed	Only what the buyer said

The lower score is the honest one. Plain chat gave credit for guesses. Prompt 2 only counts what the buyer confirmed, so it caught these gaps.

- At $75K, the board is the real approver, not Rita.
- TruckVet at 30% off is about $52K, which is under Rita's $62K budget.
- "Before Thanksgiving" was the rep's phrase, not the buyer's.
- The value case is $9K a month in contractors, about $108K a year.

Its recommendation was to skip emailing numbers Friday. Ask for 20 minutes to walk through them before Owen's leave.

Step 4. Follow-up email for Northwind

REAL TEST OUTPUT, LIGHTLY TRIMMED

To Dana, Marcus
Subject Next steps on carrier checks

Hi Dana and Marcus,

Thanks for the time last Tuesday.

Marcus, your team checks insurance, authority, and safety rating by hand, and as you put it, "It takes forever." Dana, you want it "fixed before peak season," and Priya will want to see numbers. Marcus, on the auto-expiry alerts you said, "We'd use that tomorrow."

Next, I'll send over the API docs for your TMS.

Two things I still need to understand. When does peak season start for you? What does the vendor process involve, and when should it begin?

ONE CLEAR NEXT STEP

Would 30 minutes next week work to walk through the API docs with Sam? If the timing's off, just tell me and I'll follow your lead.

Jamie

The highlighted line is the one clear next step. One ask, a specific meeting, and an easy out.

The bot's check-before-send list. API docs not attached. Confirm it's OK to bring Sam in. It left out the claim, since Dana didn't want to get into it. No budget figures invented. "Next week" is a suggestion.

The one wording fix was "Sam's vendor process" to "the vendor process," since Dana mentioned them separately.

A rep's first week

One page. Tick each box as you go.

Day 1. Set up

- [ ] Add Account Research Desk, Sales Call Coach and Call Follow-Ups from the official Grok Bot store with Add to Grok Bot. Read each listing first.
- [ ] Fill in the parts of each prompt that stay the same for your team. What you sell, your ICP, your stages, and the usual champion, budget owner and blocker titles. Save a copy.
- [ ] Run the trust test. Ask Account Research Desk about a company that doesn't exist. It should refuse, not invent.

Day 2. Before a call

- [ ] Run Prompt 1 on one real upcoming call, using only notes that are safe to share.
- [ ] Open every source link. Anything without a source is a guess until you confirm it.
- [ ] Pick one of the three questions and actually ask it.

Day 3. After a call

- [ ] Paste your notes or transcript into Sales Call Coach with Prompt 2.
- [ ] Compare its score to your gut. Read the evidence for any letter where they differ.
- [ ] Write down the biggest gap and the one thing to do before the next call.

Day 4. Follow-up

- [ ] Run Prompt 3 the same day as the call.
- [ ] Work through the "check before sending" list. Fix it, then send it yourself.
- [ ] If the deal is in Proposal or Negotiation, ask for time to walk through pricing live.

Day 5. Look back

- [ ] Count how often you asked a follow-up question after a buyer gave a number or a risk.
- [ ] Note one prompt line to change for your process, and change it.

> **Every day.** Don't paste passwords, payment details or confidential customer data. Strip names and numbers you can't share. The bots write drafts. You decide what goes out.

Want this set up for your team?

Teams that want this set up and tailored to their own sales process can reach us at **hello@ai-salesstack.com**.

Credit. Informed in part by Craig Hewitt's open-source sales skills (MIT), github.com/TheCraigHewitt/skills

Disclaimer. AI Sales Stack is not affiliated with xAI or Grok Bot, or with the creators of the store bots named here. Bot behavior is only what each store listing says, and listings can change. Test before relying on any output. Don't paste confidential customer data, passwords or payment details into any bot. The worked example uses a sample deal.