Daily Follow Up Check

Use this simple routine to keep requests, quotes and next actions clear. Start with anything overdue or due today.

01 / DAILY ROUTINE

CHECK EACH STEP AS YOU GO

01 **Review your open requests.**
Identify what needs attention now. ☐

02 **Write the next action.**
Say who needs to do what in plain language. ☐

03 **Choose a follow-up date.**
If you are waiting for someone, set the date you will check in. ☐

04 **Send the right message.**
Use your normal channel after checking the facts. ☐

05 **Update the record.**
Choose the next action and date, or mark the item complete. ☐

Three messages to adapt

02 / MESSAGE LIBRARY

First follow up	Hi [name], following up on [specific request]. Could you share an update and a realistic next date?
Quick reminder	Hi [name], checking on [item]. Do you have an update or a blocker I can help with?
Confirm completion	Hi [name], [item] is complete. The result is [summary or approved link]. Please let me know if anything is missing.

Before you send

Replace every bracketed field. Check the recipient, dates, links and promises. Share only information you are allowed to share.

This checklist does not send messages or reminders. Use it with your existing work tools.