

You got back from the last event and never found time for the follow-up.

Set up once, ready for every event

You teach CardToClose about your business one time, before your next event. After that, every follow-up you draft reads in your voice and is ready while the conversation is still warm.

WHAT YOU WALK AWAY WITH

A workspace that knows your business, so the drafts you review on the conference floor are accurate, on message, and ready to send. Nothing goes out that you have not approved.

BEFORE YOU START

Two places, one workflow

CardToClose works across two surfaces. You set up your business once on the web, then capture contacts on your phone at the event.

- The web workspace at cardtoclose.com is where you set up your business, review contacts, and export. This guide covers the web setup.
- The mobile app is where you capture a card, record the conversation, and draft the follow-up at the event. Guide 2 covers that.

WHY SETUP COMES FIRST

The quality of every follow-up draft depends on what you enter here. Spend a few minutes now and the app drafts from your real business, not a generic template.

The two things you set up

- Business profile: your defaults, used whenever an event or contact is missing context
- Collateral: your approved link library, ready to attach to a follow-up

You create your own account and start straight away. There is nothing to wait for and no one to book a call with.

Create your login

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Enter your details

YOU DO Add your first name, last name, and work email. Enter your company name and company website. Choose a password.

WHY IT MATTERS

Your name signs every follow-up, so it reads as personal outreach from you, not a tool. Adding your website now means the next step fills itself in, less setup for you.

2

Confirm your email

YOU DO Check your inbox for a confirmation email. Click the link inside to confirm your address.

WHY IT MATTERS

Every contact you capture is tied to your account, so the relationships and intelligence you build at events stay yours, not stranded in a personal inbox or lost when someone leaves.

3

Sign in to your workspace

YOU DO Log in at cardtoclose.com. You land in your Business workspace, ready to set up the areas that shape your drafts.

WHY IT MATTERS

The few minutes you spend here decide whether your follow-ups get replies. A draft built on your real business lands differently from a generic thank-you, and this is where you give it that.

Tell it about your business

This is the one setup that shapes every follow-up. Give the app your business once and every draft is built on it.

The screenshot shows the 'Business profile' setup screen in the CardToClose app. On the left is a sidebar with navigation options: Dashboard, Contacts, Events, Team members, Reports, Collateral, Business profile (selected), and Settings. Below the sidebar is a 'Capture to close' section with buttons for CAPTURE, REVIEW, and EXPORT. The main content area is titled 'Business profile' and includes a description: 'Account-level defaults used when an event or encounter is missing business context. These values also guide AI extraction and draft personalization.' Below this is a note: 'Business name, key differentiator, timing window, privacy URL, and brand voice are passed into drafting/review context. Event-specific values still win when an event provides more precise context.' There is an 'Import from business website' section with a text input field containing 'https://www.example.com' and an 'Analyze website' button. Below this is a form with several fields: 'Business name' (filled with 'CardToClose'), 'Default key differentiator' (filled with 'Turns a business card photo and a 60-second voice note into personalised follow-up c'), 'Upcoming timing or proposal window' (empty), 'Privacy policy URL' (filled with 'https://www.cardtoclose.com'), 'Raw asset retention days' (filled with '30'), and 'Brand voice notes' (filled with 'Direct, practical, and commercially focused. Emphasise fast post-event follow-up, reduced administration, human approval, and user control. Avoid hype and never imply that messages send automatically.').

Paste your website and let the app fill this in, or enter it yourself.

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Fill it in, or import your website

YOU DO Paste your public website into Import from business website and tap Analyze website. The app reads a few public pages and proposes your profile for you to review. Or fill the fields in yourself. Then tap Save profile.

WHY IT MATTERS

Two fields do the heavy lifting: your key differentiator, so a draft positions you well, and your brand voice notes, so every follow-up reads like you wrote it. The import fills these in seconds, then you review and adjust.

Event-specific details still win when a contact provides more precise context. Everything here is the default the app falls back on.

STEP 5 · COLLATERAL

Collateral: your approved links

A draft is built from your voice note plus what you set once in the workspace: your business profile and your collateral. Your collateral is the set of links you share most.

Add them once. A draft sees the titles and can point to the right one. Nothing is emailed on its own, you choose what to include.

The screenshot shows the 'Collateral' management page in the CardToClose workspace. On the left is a sidebar with navigation options: Dashboard, Contacts, Events, Team members, Reports, Collateral (highlighted), Business profile, and Settings. The main content area is titled 'Collateral' and includes a description: 'Approved links team members can use after review, and titles the AI can consider when deciding what material may be relevant to an encounter.' Below this is a note: 'Collateral URLs are not automatically emailed. They are an approved library: AI sees the titles as context, exports can surface them, and team members choose the right link for each direct follow-up.' There is a form to 'Add collateral' with fields for Title, URL, Segment, and Use case, and an 'Add collateral' button. At the bottom, there is a list of existing collateral items, each with an 'Edit' and 'Archive' button. The items are: 'Onboarding Resources' (https://www.cardtoclose.com/resources), 'Onboarding Get Set up' (https://www.cardtoclose.com/getsetup), and 'CardToClose Website' (https://www.cardtoclose.com/).

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Step 5 · Add a collateral link

YOU DO Enter a Title and the URL. Add the Segment and the Use case so the app knows when it fits. Tap Add collateral.

EXAMPLE COLLATERAL

Title: CardToClose product overview

URL: <https://www.cardtoclose.com/>

Segment: Conference-led sales professionals and teams

Use case: Present the website, explain the workflow, benefits, controls, and FAQ.

YOU ARE READY FOR YOUR NEXT EVENT

Setup is done, and it is done for good. Your workspace now knows your business and your links. Walk into your next event knowing the follow-up is handled before you land. Guide 2 shows you the two minutes it takes per contact.