

Get the most from CardToClose

Short guides and tips to help you turn every conference conversation into a follow-up worth replying to. Start with the voice note, the one habit that changes everything.

WHAT IS HERE

The two setup guides, the walkthrough video, and four tips: the voice note, making drafts sound like you, your follow-up control room, and getting your data out.

START HERE

Everything in one place

Work through these in order the first time. Come back to any of them whenever you need a reminder.

The guides

- **Guide 1, Workspace setup.** Set up once so every follow-up is built on your business. Web.
- **Guide 2, Your first contact.** From a business card to a follow-up ready to send, in about two minutes. Mobile.
- **Walkthrough video.** One real capture, start to finish, in under four minutes.

The tips

- **Tip 1, The voice note.** The 60 seconds that decide how good your follow-up is.
- **Tip 2, Make it sound like you.** Add your collateral so drafts can point to the right link.
- **Tip 3, Your follow-up control room.** See what is captured, what needs input, and what is ready.
- **Tip 4, Get your data out.** Export to CSV, Excel, or a Google Sheet for your CRM.

IF YOU READ ONLY ONE

Read the voice note tip. It is the single biggest lever on whether your follow-ups get replies.

TIP 1 • THE VOICE NOTE

Say three things, get a follow-up worth sending

The follow-up is only as good as what you say in your voice note. You do not need a script. Cover three things and the draft has everything it needs.

- **Who they are.** Their name, company, and role, and anything about their situation that stood out.
- **What they need.** The problem they are trying to solve, or what they are looking for. This is what makes the follow-up feel personal.
- **The next step.** What you agreed, or what you want to happen next. This is what turns a thank-you into a moving conversation.

WHAT GOOD SOUNDS LIKE

"This is Sarah Chen, Head of Events at Meridian Hotels. She runs about twelve corporate offsites a year and is frustrated her team loses track of venue contacts after every trip. She liked that we work offline. Next step is to send her the product overview and suggest a short call the week of the 20th."

That is 30 seconds. It names who, what, and the next step, so the draft comes back specific and ready.

ONE HABIT

Record it right after the meeting, before the next conversation. The detail fades faster than you think.

Works offline. Record at the booth, in the lobby, or on the plane. It syncs when you are back online.

TIP 2 • MAKE IT SOUND LIKE YOU

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 CardToClose Business workspace interface. On the left is a sidebar with navigation links: 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. Below the form are three sections of existing collateral: 'Onboarding Resources' with a link to https://www.cardtoclose.com/resources and a description 'resources and tips on how to use the app'; 'Onboarding Get Set up' with a link to https://www.cardtoclose.com/getsetup and a description 'How to set up the workspace'; and 'CardToClose Website' with a link to https://www.cardtoclose.com/ and a description 'Conference-led sales professionals and teams Present website, Explain the workflow, product benefits, controls, and frequently asked questions'. Each section has 'Edit' and 'Archive' buttons.

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.

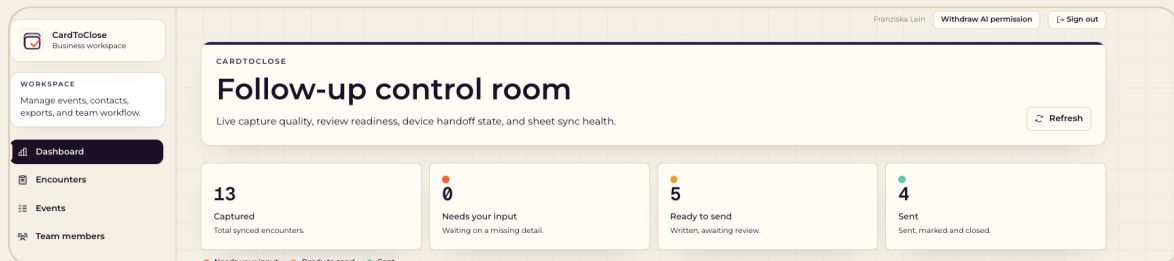
DO THIS BEFORE YOUR NEXT EVENT

Your top three or four links are enough to start. You can always add more later.

TIP 3 · YOUR FOLLOW-UP CONTROL ROOM

See what is done and what still needs you

The dashboard is your overview of every contact. At a glance you know what is captured, what is waiting on you, what is ready to send, and what has gone out.



- **Captured.** Every contact synced from your device.
- **Needs your input.** A follow-up is waiting on a missing detail. Start here.
- **Ready to send.** Written and waiting on your review.
- **Sent.** Sent, marked, and closed.

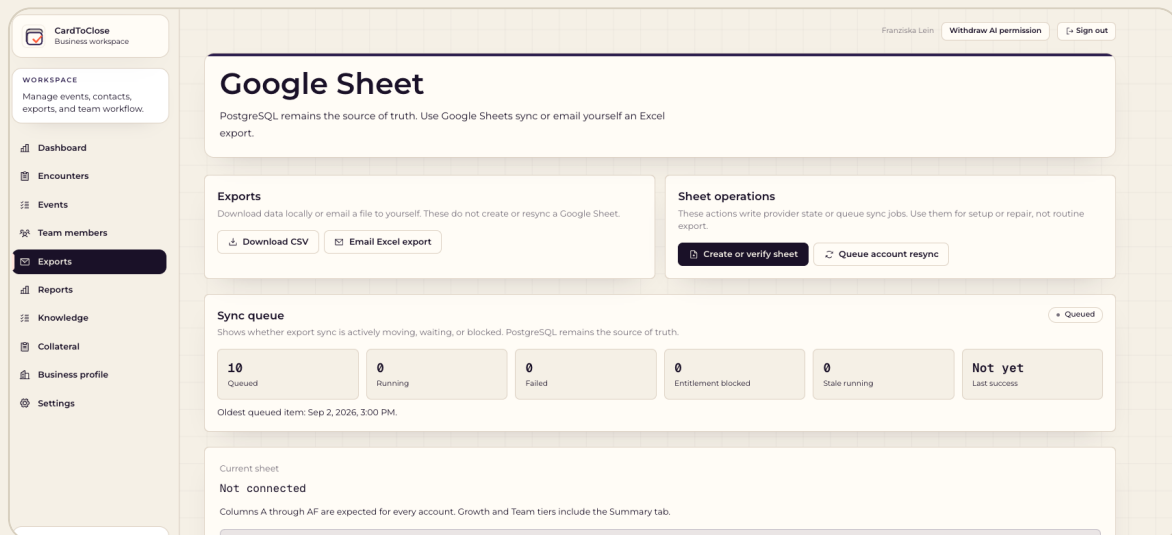
HOW TO USE IT AFTER AN EVENT

Clear Needs your input first, then work through Ready to send. When both are empty, your whole event is followed up.

TIP 4 • GET YOUR DATA OUT

Into your CRM, your way

Your reviewed contacts and follow-ups are yours to take anywhere. Export from the workspace in the format that fits your CRM.



- **Download CSV.** The quickest way to pull your data for a CRM import or mail merge.
- **Email Excel export.** Have an Excel file sent to your own email.
- **Google Sheet sync.** Keep a live sheet in sync for a shared team view.

Exports are sent only to the signed-in user's email. Your data stays yours.

YOU HAVE THE FULL PICTURE

Capture on your phone, review in your control room, export to your CRM. That is the whole loop, and it runs in minutes, not the days you used to lose after a trip.