

HUMANS + AI IN FOLLOW-UP

The Daily Call List Playbook

Decide who comes first once, build the list before the day starts, and give every call a reason.

Companion to the article [How Inside Sales Teams Should Decide Who to Call First](#)

STEP 1 Work the list in this order

1

New inbound leads
Anyone who just reached out.

MINUTES

2

Hand-raisers
Replied, asked, requested info or missed a booking.

SAME DAY

3

A band + a reason
Top of your own score with a timing trigger today.

THIS WEEK

4

Promised follow-ups
Anything a rep committed to.

AS PROMISED

5

Everyone else
Multi-channel nurture until they raise a hand.

AUTOMATED

STEP 2 Build the daily list

Fill this in the afternoon before. Every row needs a reason, or it does not make the list.

#	NAME	TIER	REASON TO CALL TODAY	OPENER	OUTCOME
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

STEP 3 Reasons that justify a call

A reason turns a cold call into a relevant one, and gives your rep an opener.

Anniversary of their purchase

Renewal or contract date coming up

Life event: move, new job, growing family

Replied to a message

Asked for a quote or pricing

Price or rate change that affects them

Referral from a customer

Missed a booked appointment

STEP 4 Keep score every week

METRIC	TARGET	WEEK 1	WEEK 2	WEEK 3	WEEK 4
Speed to first response, new leads					
Conversations started					
Appointments set per calling hour					
Share of A band contacted					
Sales or appointments by tier					

End-of-day routine

- ☐ Log every outcome before you leave
- ☐ Move hand-raisers to tomorrow's tier 2
- ☐ Schedule every promised follow-up
- ☐ Pull tomorrow's A band with reasons
- ☐ Review the list for 10 minutes in the morning

Let AI take the volume

People take the conversations that are ready. **An AI agent** covers first touches, after-hours replies and the long tail of follow-up, then hands off with a short brief.

Measure conversations, not dials. A rep working a list with reasons will beat a rep chasing a dial count.

Let your data build tomorrow's list

Agent Legend scores your database, surfaces who to contact and why, and lets Hazel, our AI sales agent, handle first touches.

agentlegend.com/book-a-demo