

# Keep the next step close.

A one-page working sheet for a resource your account team has approved to share.

**BEFORE YOU SHARE**  
Confirm the destination, its owner, and who should be able to open it.

Resource or next step (keep account details out of this sheet)

Approved destination URL or page name

Resource owner

Review date

**READY TO USE?**

- ☐ Destination opens as expected
- ☐ Sign-in requirement is clear
- ☐ Public or approved to share

**REVIEW BEFORE THE MEETING**

- ☐ Named owner can update it
- ☐ Review date is still current
- ☐ No notes, pricing, or credentials

**Small pilot readout**

Compare the current follow-up process with a small group using the assigned resource route.

| Date / meeting | Time to open | Repeat request? | Follow-up owner recorded? |
|----------------|--------------|-----------------|---------------------------|
|                |              |                 |                           |
|                |              |                 |                           |
|                |              |                 |                           |

**Keep the boundaries clear.**

A tap is not a lead, buying signal, or CRM update. Keep customer data, meeting notes, pricing, credentials, and private contacts in authorized systems. The tag opens its assigned destination only.