



Following Up

Selling with Confidence

Hire ❖ Develop ❖ Retain

Selling with Confidence: Following Up

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The Importance of Following Up

With over 80% of sales requiring more than 5 follow ups, it's critical that we take initiative and continue to connect.

Competition

You're not JUST competing with other marketing companies. You're competing for their time, their resources, their attention. If you know they're shopping, it's even more important to follow up with confidence and act like you're the only player on the field.

The Forgetting Curve

Prospects forget over 40% of what we told them after just 24 hours. And another 40% with every day that passes. The longer between touch points, the more they've forgotten.

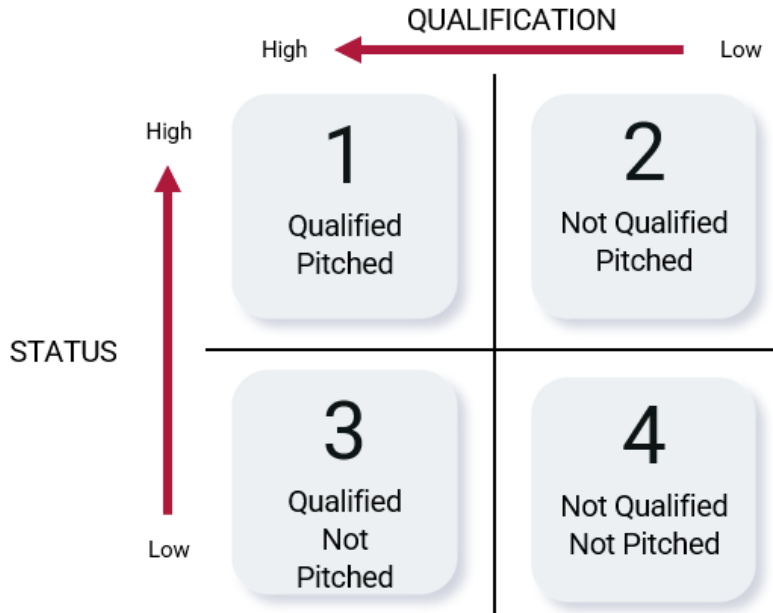
There's a Problem that Needs to be Solved

We met with them for a reason. By making NO decision, they aren't solving their problem. Help them solve the problem.

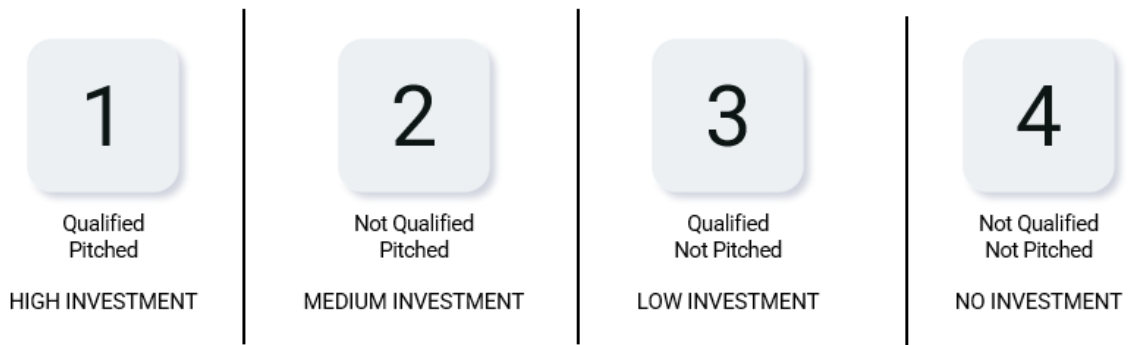
Who Deserves a Follow Up

Determining who to follow up and the way in which you follow up can be determined by the correlation of their qualification and their status within the sales cycle. Their investment in your solution will determine your investment in their follow up. Use the diagrams below to determine where your prospects fit in the model.





Once you’ve determined your prospects place within the model, use the correlations below to see how invested they are and how invested you’ll need to be to get them to the “yes.”



Choosing a Connection Medium

There is numerous ways that you can follow up with a prospect or client. While calls and emails are most common, consider alternative methods of connection:

- Text
- Social Media
- Video
- Drop-In
- Events/Networking

When To Follow Up

The FREQUENCY and RELEVANCE of your follow up is determined by the INVESTMENT. The charts below provide example cadences that can be followed based on a prospect’s level of investment.



HIGH INVESTMENT CLIENTS

	Week 1					Week 2					Weeks 3 - ???			
	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10	Weeks 3-4	Weeks 5-7	Week 8 ->	
CALL or DROP IN		Scheduled Call or F2F Meeting							Call or Drop In		Call or Drop In			
DIGITAL	Email	Text <small>(if no call scheduled or no answer)</small>		Text, Email, Video <small>(if no call scheduled or no answer)</small>		Social		Text, Email <small>(if no answer)</small>		Text <small>(if no answer)</small>	Alternate <small>Call, Email, Text, Social</small>	Alternate <small>Call, Email, Text, Social</small>	Alternate <small>Call, Email, Text, Social</small>	
PURPOSE	Recap Pain, Solution, and Next Steps	Decide Personalized Validation		Decide		Personalized Connection		Validate		Decide	Engage Validate	Remind Educate Engage Schedule	Remind Educate Engage Schedule	
RESOURCE	Proposal	Case Study Testimonial		Short N Sweet Script		Follow/Like Comment/ DM		Case Study Testimonial Article		Break up Script	Case Study Testimonial Article	Press Blog Posts Webinars Industry News	"Thought of you" "Email Blast" Press Blog Posts Webinars Industry News	

MEDIUM TO LOW INVESTMENT CLIENTS

Medium	
<i>Weeks 3-4 for High Importance</i>	
FREQUENCY	2X per Week
ACTIVITY	Alternate Call, Email, Text, Social
PURPOSE	Engage Validate
RESOURCES	Case Study Testimonial Article

Medium/Low	
<i>Weeks 5-7 for High Importance</i>	
FREQUENCY	1X per Week
ACTIVITY	Alternate Call, Email, Text, Social
PURPOSE	Remind Educate Engage Schedule
RESOURCES	Press Blog Posts Webinars Industry News

Low	
<i>Week 8 and onward for High Importance</i>	
FREQUENCY	1X per Month
ACTIVITY	Alternate Call, Email, Text, Social
PURPOSE	Remind Educate Engage Schedule
RESOURCES	"Thought of you" Press Blog Posts Webinars Industry News



What To Say

Prepare for your follow up just as you would any other call or meeting. Set the stage in your last touchpoint with the client to ensure a smooth follow up.

- Set Next Meeting Expectations
 - “When we talk on Thursday at 2pm, I’ll answer any final questions you have and we’ll discuss the steps needed to get started.”
- Sent Recap Email and Next Appointment Invite
 - Short and sweet is the name of the game.
 - Bullet point the benefits on WHY they should buy and make sure to send a calendar invite for the next meeting.
- Planning for Success
 - Script your opening and plan for objections.



- Know the points you need to hit to get the deal closed.

When you call or join the meeting, use this simple 3 step process to move to the close quickly and effectively:

1. Start with an engaging question
 - a. Ask a specific question related to your last conversation that gets them engaged and keeps the conversation positive
 - i. "Since we last spoke, what has you most excited about this solution/product/service?"
2. Ask for the close confidently and assumptively
3. Manage resistance like a pro

When To Call It Quits

When prospects are unable to make a decision, it's time for you to move them up or out of your sales funnel. By maintaining control of the process, you decide when to cut the prospect loose and ensure your time is being spent where it needs to be. Here are 3 things to consider when determining if it's time to let a prospect or opportunity go:

1. Create a "Rule"
 - a. Know the sign, signal, touchpoint when you will let a prospect go.
2. Write The Script
 - a. Formulate your "breakup" text/email, voicemail message.
3. Update your Funnel
 - a. Change the status to "lost" and push them to the bottom of the list.

Tools of the Trade

- CRM or Calendar
 - Use calendar reminders or tasks
 - Create Quick Step Templates for your "go-to" follow up email types
 - Use automation
- Funnel Tracker
 - Keep yourself up to date on the cadence
 - Move them to the bottom of the list if you're playing a long game
- Company Provided Content
 - Email Blasts/Social Media/Webinars/ Case Studies/ Testimonials/Events/ Invites
 - Link content to company website for retargeting or tracking

Key Takeaways

When it comes to following up, you get out what you put in. Stay diligent and consistent and you'll reap the rewards.

- Connect
 - Have purpose in every touchpoint
 - Produce value
 - Connect genuinely and positively
 - Keep connecting



- Plan
 - Create the plan, stick to the plan, execute the plan.
 - Hold yourself accountable.
 - Know your "rule"
- Use Your Tools
 - Create a system with the tools you have
 - Be creative on the mediums you utilize
- Add
 - Looking for more people to follow up with? Add to your funnel!



Corporate Membership

Compensation

Compliance

Background Screening

Recruiting & Talent Acquisition

HR Consulting

Training

Leadership Development



Missouri

12851 Manchester Road
Suite 150
St. Louis, MO 63131

Indiana

450 E. 96th Street
Suite 500
Indianapolis, IN 46240

Florida

43 Skyline Drive
Suite 1001
Lake Mary, FL 32746

Illinois

300 Hamilton Blvd
Suite L110
Peoria, IL 61602