

## WORKSHOP 5

# The Follow-Up System

*The money is in the follow-up. Most people quit too early.*

 30–45 MINUTES

# The Numbers Don't Lie

## Follow-Up Reality

48% of salespeople NEVER follow up

25% stop after two follow-ups

12% stop after three

Fewer than 10% follow up more than four times

## When Sales Actually Happen

2% close on the first contact

3% on the second

5% on the third

10% on the fourth

*"You are not chasing. You are helping someone make a decision. Silence is not rejection — it is indecision. Your job is to gently keep moving them forward."*

# MINDSET & REALITY

*Why most follow-up fails —  
and how to change that*

- ✓ 80% of sales close between the 5th and 12th contact
- ✓ Silence from a prospect is indecision — not rejection
- ✓ Follow-up is helping someone make a decision — not chasing
- ✓ I feel confident following up multiple times without feeling pushy
- ✓ I know my current follow-up conversion rate
- ✓ I know how many touch points my process currently has
- ✓ Following up is a commercial discipline — not a personality trait

# THE 11 TOUCH POINTS

*Your follow-up sequence —  
mapped and owned*



1. Phone within 24hrs of proposal: 'What did you think?' Then stop talking



2. Email at day 3 — happy to answer any questions



3. Phone at day 7 — checking if they've had a chance to review



4. Value-add email at day 10 — tip, case study, or example of our work



5. Short text at day 14 — checking in without pressure



6. Phone at day 21 — has anything changed on their end?



7. Testimonial or result example email at day 30

# THE 11 TOUCH POINTS

*Your follow-up sequence —  
mapped and owned*

|   |                                                    |
|---|----------------------------------------------------|
| ✓ | 8. Yes-framed non-responder email at day 45        |
| ✓ | 9. No-framed non-responder email at day 60         |
| ✓ | 10. Phone at day 90 — check in and gather feedback |
| ✓ | 11. Final availability touch at day 120            |

# SYSTEMS & OWNERSHIP

*Follow-up must be  
scheduled, not remembered*

- ✓ Our follow-up sequence is written down — not in anyone's head
- ✓ Every touch point has an assigned owner — not 'whoever remembers'
- ✓ We use a CRM, spreadsheet, or job system to track all open proposals
- ✓ No proposal goes more than 7 days without a logged follow-up action
- ✓ Open pipeline reviewed at least once a week
- ✓ Follow-up emails and texts are templated — not written from scratch each time
- ✓ Our follow-up system can run without the owner — it is not owner-dependent

# LEARNING FROM LOST PROPOSALS

*The feedback call is gold*



We regularly call past proposals that went cold — not to resell, but to learn



When a prospect chose a competitor: 'Do you mind me asking who you went with... and why?'



When a prospect didn't proceed: 'What made you change your mind?'



We always ask: 'If you were to go ahead in the future, what would you like to see?'



We track patterns from feedback calls — what comes up most often



Feedback calls have changed how we quote, present, or follow up



We use yes-framed and no-framed non-responder emails to re-engage cold prospects

## WORKBOOK ACTIVITY — All 4 Stages

*Rate each suggestion Y / N / M — then complete the improvement box*

- Rate each suggestion in all four sections: Y / N / M.
- Fill in your 11 touch points in the workbook with exact timing and owner.
- List 10 past proposals you will call this week.
- Circle your traffic light rating on the summary page.
- Key output: a written 11-touch follow-up sequence — scheduled and owned.

# YOUR ACTION THIS WEEK

- 1 Block 60 minutes this week. Call ten past proposals. Write down every pattern you hear.
- 2 Write out your 11 touch points with exact timing and assigned owner. Not from memory.
- 3 Set up a simple tracking system — even a spreadsheet — so no lead goes uncontacted.



## GO DEEPER — WEBSITE RESOURCES

**The Money Is In The Follow Up** (CONVERT) — Quick steps to make following up easier so you can make more sales.

**14 Day Lead Sequence** (CONVERT) — Warm up a prospect using automated emails in a specific sequence.

**9 Proven Plug & Play Templates** (CONVERT) — 9 proven templates for more sales, reviews, and referrals.

**Newsletter & Database Strategy** (CONVERT) — An up-to-date database is one of the most valuable assets in your business.

**Retention & Reactivation Strategies** (RETAIN) — Win back the right clients and maximise the profit from your database.