

BUSINESS MAXIMISER COACHING

WORKSHOP 5 — WORKBOOK

The Follow-Up System

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

Name: _____ Business: _____ Date: _____

HOW TO USE THIS WORKBOOK

For each stage, rate each suggestion Y (Yes), N (No), or M (Maybe/Partially). On the summary page, use the traffic light to rate your overall performance at each stage. Use the improvement boxes to capture what you will do about it.

● **GREEN**

On track — doing this well and consistently.

● **YELLOW**

Needs attention — done sometimes but inconsistently.

● **ORANGE**

Priority area — significant gaps, address soon.

● **RED**

Urgent action — not doing this at all.

STAGE 1 — MINDSET & REALITY

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

Best-Practice Suggestion	Y	N	M
I understand that 80% of sales close between the 5th and 12th contact	☐	☐	☐
I understand that silence from a prospect is indecision, not rejection	☐	☐	☐
I have reframed follow-up in my mind — I am helping someone make a decision, not chasing	☐	☐	☐
I feel confident following up multiple times without feeling like I am being pushy	☐	☐	☐
I know my current follow-up conversion rate (proposals sent vs jobs won)	☐	☐	☐
I know how many follow-up touch points my process currently has	☐	☐	☐
I have identified the point in my follow-up where I typically give up too early	☐	☐	☐
I believe that following up is a commercial discipline — not a personality trait	☐	☐	☐

What will I do to improve my MINDSET & REALITY stage?	By when? / Who owns it?

THE 11 TOUCH POINTS

Your follow-up sequence — mapped and owned

Best-Practice Suggestion	Y	N	M
We follow up by phone within 24 hours of sending every proposal	☐	☐	☐
We send a follow-up email at day 3 if we haven't heard back	☐	☐	☐
We call again at day 7 to check if they've had a chance to review the proposal	☐	☐	☐
We send a value-add email at day 10 (tip, case study, or example of our work)	☐	☐	☐
We send a short text at day 14 to check in without pressure	☐	☐	☐
We call again at day 21 to ask if anything has changed on their end	☐	☐	☐
We send a testimonial or result example at day 30	☐	☐	☐
We send a yes-framed non-responder email at day 45	☐	☐	☐
We send a no-framed non-responder email at day 60	☐	☐	☐
We call at day 90 to check in and gather feedback	☐	☐	☐
We make a final touch at day 120 to let them know we have availability	☐	☐	☐

What will I do to improve my THE 11 TOUCH POINTS stage?	By when? / Who owns it?

STAGE 3 — SYSTEMS & OWNERSHIP

Follow-up must be scheduled, not remembered

Best-Practice Suggestion	Y	N	M
Our follow-up sequence is written down — it does not live in anyone's head	☐	☐	☐
Every follow-up touch point has an assigned owner — not 'whoever remembers'	☐	☐	☐
We use a CRM, spreadsheet, or job management system to track all open proposals	☐	☐	☐
No proposal goes more than 7 days without a logged follow-up action	☐	☐	☐
We review our open proposal pipeline at least once a week as a team or as an owner	☐	☐	☐
Our follow-up emails and texts are templated — we don't write them from scratch each time	☐	☐	☐
We have a clear definition of when a proposal is officially 'dead' and removed from our pipeline	☐	☐	☐
Our follow-up system can run without the owner — it is not owner-dependent	☐	☐	☐

What will I do to improve my SYSTEMS & OWNERSHIP stage?	By when? / Who owns it?

STAGE 4 — LEARNING FROM LOST PROPOSALS

The feedback call is gold

Best-Practice Suggestion	Y	N	M
We regularly call past proposals that went cold — not to resell, but to learn	☐	☐	☐
When a prospect went with a competitor, we ask who they chose and why	☐	☐	☐
When a prospect didn't proceed, we ask what made them change their mind	☐	☐	☐
We ask every lost prospect: 'If you were to go ahead in the future, what would you like to see happen?'	☐	☐	☐
We track the patterns from our feedback calls — what comes up most often	☐	☐	☐
Our feedback calls have changed how we quote, present, or follow up	☐	☐	☐
We use non-responder emails to re-engage cold prospects — yes-framed and no-framed versions	☐	☐	☐
We have used the insight from feedback calls to win back at least one past prospect	☐	☐	☐

What will I do to improve my LEARNING FROM LOST PROPOSALS stage?	By when? / Who owns it?

YOUR SUMMARY

Circle the traffic light that best reflects your overall rating at each stage

MINDSET & REALITY	THE 11 TOUCH POINTS	SYSTEMS & OWNERSHIP	LEARNING FROM LOST PROPOSALS
			
Biggest priority:	Biggest priority:	Biggest priority:	Biggest priority:
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-

My #1 priority from this workshop is:	I will complete this by:
-	-
-	-
-	-

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.