



## SAMPLE LEAD FOLLOW-UP SCHEDULE: 365 DAYS

Creativity follows commitment. Your commitment to follow-up must be so unreasonable that you keep returning to your leads with new reasons to get in contact, even if they claim they're not interested. In this section, you'll find an entire year's worth of ideas that will spark your own creativity as you follow up with your leads in ways that make you stand out in your niche.

The next few pages will also show you what a full 365 days of follow-up could look like.

Model this sample calendar to turn your unsold leads into customers. Remember, you have to be willing to do what others won't—and following up over the course of a full year certainly qualifies.

Obviously, every industry and every type of sale is a little different, but use this template as a model to get you started. You'll also find a blank schedule at the end of the sample schedule so you can put together your own version of this calendar.

Timing	Channel	Context & Messaging
Same day.	Text	You made first contact with your lead, but you didn't close the deal. Send a simple thank you text. "Thank you for coming by today. --[Your Name]"
One hour later	Phone call	Call and say, "Again, I want to thank you. It was really special meeting you." Leave a voicemail if you have to.
Day 1	Phone call	Make a follow-up call the next day. Messaging: "I had an idea about something that would benefit you, and I'd like to set up a time to meet, either tomorrow or the next day." Get them to commit and ask for a personal visit. If you're out of the area, substitute with a video call via Skype or Zoom.
Day 2	Letter and phone call	Put together a short, tight handwritten letter, then call your lead and say, "Hey, John, I'm sending you a letter. I want to make sure I have the right address for you, because I want to be sure you're going to get it." You can send this message via email, but a phone call is better.
Day 3	Text and email	Film a selfie video, and remember to shoot with your back to the wall and the light in your face. Messaging: "Great meeting you. I have some information I think would be very valuable to you. You can reach me at [Your Cell Number]." Text it to your lead, then email it to them.

Timing	Channel	Context & Messaging
Day 4	Phone call	If you haven't done this already, it's time to make the Personal Visit Offer. Call and say: "Rachel, I'm going to be in your neighborhood this afternoon. I'd like to come by and talk with you." If they're out of state, set up the meeting for next month. Or, if this business is important enough, say, "I'm going to be in Las Vegas next week. I'd like to come visit you. Is that possible?" More often than not, you're going to get turned down, but, remember, be the water. Keep wearing down that stone.
Day 5	Email, text, or phone call	Use the "I thought of you when I saw this" excuse to get in contact. Find a piece of data or a piece of your content that makes you think of your lead. Make a phone call, shoot them a text, or send them an email that says, "I thought of you when I saw this," and share the link, data, or content.

*Note: It's not necessary to give the lead a five-day breather at this point, but you may want to, so they don't feel like you're jumping on them every day.*

Timing	Channel	Context & Messaging
Day 10	Email, text, or phone call	Take an event in your area, either one related to your company or one that's in line with your brand (get creative!) and invite your lead to the event. Messaging: "Hey, I want to invite you to an event that we're doing / that I thought would be useful to your business." The event can be far in the future—30, 60, or even 90 days out—but you want to make the contact now.
Day 14	Email, text, or hand-written cover note	Think of this as an informational push. Use this communication to send information-based links that relate to the concerns of your lead's company as well as their buying decision. Once again, you're chipping away at your lead. Messaging: "Thinking about you and your company. I wanted to share this data because I know you could benefit from this." Don't forget to provide your cell number if you send this via email or mail.
Day 21	Email and phone call	Film a video on a specific topic, such as a product coming in, a benefit you want your lead to know about, or some kind of revelation you've had about how this product can help your lead. Email this to your lead (include your cell number!), then call and say, "I want to be sure you're getting my emails, and they're not going to your spam folder. I have some information I think that would be very valuable to you, and I just emailed it over."

Timing	Channel	Context & Messaging
Day 30	Email, phone call, and/ or mail but follow up via phone if you use mail or email	Make another event offer. Use your imagination. It could be coffee, lunch, or something really special like a baseball game. It should be something within the next 30-60 days that makes your lead feel important, like they're getting the VIP treatment. If you mail it or email it to them, call them, too. Messaging: "Hey, I just sent you an invite, and I want to be sure my email didn't go to your spam folder / mail got delivered." That's real follow-up.
Day 40	Email or phone	Today's follow-up goes straight for the heart. Messaging: "Hey, I was just thinking about you. Literally woke up and was just thinking about you as a potential client in the future and someone I consider to be a friend."

*If you're feeling discouraged at this point, don't give up! Stick with it, and you're going to get this deal.*

Timing	Channel	Context & Messaging
Day 50	Email, text, or phone call	It's time to make a special offer to your lead. If you sell air conditioners, offer them a free filter. If you wash cars, offer a free wash. If you're a barber shop, offer a free cut. Most offers are never redeemed, so it's likely not going to cost you anything. Use this offer as a reason to follow up and, remember, you're not asking them to buy. You're asking to give them something.
Day 60	Phone call	Pick up the phone and give your lead a call. Messaging: "I want to come see you today or tomorrow" or "I'm going to be in your area with another client, and I'd like to come by and see you." If they're out of state, set this up for another time. "I'm going to be in your area next Monday or Tuesday. I'd like to stop by and meet you." You're now at 60 days of relentless follow-up. I promise you, it's paying off.
Day 75	Email, mail, or text	Send the client a photo mock-up. Maybe it says "Future Customer of the Month." Maybe put your lead on the cover of Time or Forbes magazines. Send it with a little note that says, "You're the best."
Day 90	Phone call	Now that you're at 90 days, it's time to ask someone else to intervene. Have a manager call and ask one simple question, "Why haven't you done business with us?" The manager should not try to close. Just collect the data and give the information to you. If this 90-day call turns into a hot lead that's ready now, you should take advantage of it.

## Alternative to the Manager Call: The Exit Survey

Now, this clever follow-up hinges on six critical questions:

- 1 Did we have what you wanted? (Yes/No)
- 2 Did we get you figures / an offer on it? (Yes/No)
- 3 Were we within your budget? (Yes/No)
- 4 On a scale of 1-10, how would you rate our solution?
- 5 What is your biggest concern at this time? (Open-ended)
- 6 What would we have to do to earn your business? (Open-ended)

Share these questions with your lead either on paper or with an iPad, and get ready to learn some extremely valuable insights. They'll tell you what you have to do differently to close more leads.

Timing	Channel	Context & Messaging
Day 100	Mail and phone call	Nothing has worked yet, so it's time to use a special gift. It could be a dollar gift. It could be a lottery ticket. It could be something you made. Send it out. But before you send it, pick up the phone and call your lead. Messaging: "I just want to be sure I have the right address for you. I'm sending out a special gift." Even if you know the address is right, make the call anyway.
Day 120	Phone call or text	Make your third personal visit offer. Messaging: "I'm going to be in your area, and I'd like to stop by and buy you a cup of coffee / get you lunch." Even if they don't take you up on this offer, it's still doing what it's meant to do, showing your lead that you're willing to invest in your relationship.
Day 150	Email, and/or in person	Now that you're almost halfway through the year, it's time phone call, to drop off a special offer. Either email and call your lead, or simply call them. Messaging: "I want to stop by and drop off something special from the company, a special offer for you." You could also drop by cold and leave this offer with your lead or their assistant.

Timing	Channel	Context & Messaging
Day 180	Email or text	Send over a link to your lead with some compelling information and a note that says something like, “This made me think of you.” The information could be a new story that could affect their company, information about your company, data about the economy, a note about recent events that might affect their company—something that will impact them and their buying decision.

Don’t give up yet. It might be tempting, but you’ve still got some strategies in your arsenal. Keep at it!

Timing	Channel	Context & Messaging
Day 210	Email, text, or phone call	Share something that just crossed your desk. Maybe you have a new product, a new feature, or some other idea that just popped up that will solve a problem for your lead. Reach out via email, text, or phone. Messaging: “Hey, I just got this in / just saw this update / just saw this new model, and I thought of you. Hit me back, and I’ll tell you all about it.”
Day 240	Phone call	You’re going to trigger what we call the “apology contact.” Call your lead and say, “Hey, I want to apologize to you if you have a minute. I just woke up this morning and I felt bad that I haven’t been able to secure your business, and I want to apologize for whatever I’ve done to misread your needs or misread you.” Then stop and listen. Many times, your prospect will say something like, “You haven’t done anything wrong. I’m just not ready yet.” Receive whatever data your lead offers you, collect it, and see if something’s changed. Remember, a whole bunch of things could have happened throughout this follow-up. This contact can give you new data, new information, and new reasons to stay in contact.
Day 270	Mail	Now that we’re at Day 270, it’s time to try a gimmick. Send your lead a giant chocolate boot candy with a personal note from you that says, “I need to get my foot back in the door.” You might not like this idea, but it doesn’t matter. We’re just trying to be that stream that wears out that rock over time. Write that note, and send out that boot.

Timing	Channel	Context & Messaging
Day 300	Phone call	Reach out to your lead and ask them a favor: to be a person of influence with your company. That's right, you're going to call them and ask them a favor. Messaging: "We think so much of you that we'd like to have you speak to our company because we see you as a person of influence." You can invite them to come in person or via video conference. You're asking for a favor. People love this because it makes them feel good—and it gives you a reason to be in touch. This strategy is going to actually make a difference for you and turn that 20% that don't buy in the first 11 months into customers. This could be the one that makes your lead say, "Let's roll."
Day 330	Phone call, personal visit, handwritten note or email	Here's your chance to make your testimonial request, as we discussed in Part 5, "Out-of-the-Box Techniques." You can make this request via handwritten note or email, but you'll likely get the best response from a phone call or a personal visit. If your lead asks if they can do it later, push to get it right then and there. You might say something like, "What would you say about me? I'll write it up and send it back to you to approve."
Day 365	Phone call	This is it. 365 days, exactly one year since you first made contact. Today, pick up the phone, call your lead and say this: "Clearly, you can see I'm not going away. Is there any way we could consummate this on the 12-month anniversary of our first contact?" Be direct. Be clear and concise, and ask for their business. Today is your one-year anniversary. Take advantage of it.

## Your Turn

Now that you've seen a sample calendar that covers contact with an unsold lead over 365 days, you'll have the opportunity on the next few pages to create a follow-up calendar that works for your business. You may want to scan or copy the blank template before you fill it out, so you can use it over and over again with new types of leads.



Track every follow-up action you take in your CRM so you know with certainty where you are in the calendar for each opportunity. If you take good notes, you'll also quickly see which follow-up strategies are most effective.



## YOUR CONTACT FOLLOW-UP PLAN

Timing	Channel	Context & Messaging

Don't allow even one second of worry or analysis to delay you. Every second you spend thinking is a second of action that you're wasting.

Timing	Channel	Context & Messaging



Timing	Channel	Context & Messaging

Be willing to be uncomfortable. It's a sure sign that you're on your way to success.

Timing	Channel	Context & Messaging



Timing	Channel	Context & Messaging

Figure out ways to take advantage of the traditional thinking that holds others back.

Timing	Channel	Context & Messaging

Until you become completely, unreasonably fixated with only getting results, you will fall short of achieving what you desire.

Timing	Channel	Context & Messaging

Timing	Channel	Context & Messaging

It's not necessarily the smartest and brightest who win in the game of life, but rather those who can commit the most passionately to their cause.

Timing	Channel	Context & Messaging

## 2 The First Month of Post-Sale Follow-Up

Now, we're going to take a look at how we can do more—how we can put into play two years of strategies and tactics that will allow us to absolutely dominate our landscape.

Timing	Channel	Context & Messaging
Same day	Phone call	Call and say, "The reason I'm calling is to thank you for your business. I appreciate the opportunity to serve you. I want to express how grateful I am for your business. I want to exceed your expectations, so expect a number of calls so that I can make sure you're happy with your investment." If the customer is happy, ask for a referral: "Who do you know that would benefit from my service?"
Day 3	Personal visit or phone call	Make your reason crystal clear with a message like, "The reason I'm calling is to ask if you have any problems that I can resolve. Do you have any questions that I can answer? Is there anything you need?" Or, "The reason I'm calling is I'd love to know if you've gotten any compliments or any feedback from others." Again, if it's a positive call, ask for a referral.
Day 7	Phone call	Call and ask the "questions" question: "The reason why I'm calling is that it's been about seven days now. By this time, I thought that you've had your product long enough that you might have some questions."
Day 14	Video message	Make the customer feel special by recording a video message. You could also ask your entire team to record with you, or pick someone like the service manager to record it. Messaging: "Hey, John. The reason I'm shooting this video is to ensure that you're satisfied. I woke up this morning thinking about you. You're a great customer. In fact, you're on our V.I.P. list. If you ever need anything, just text me back at 555-555-1234. Be sure you save it in your phone so you have it when you need it. Have a great day. Enjoy your new purchase, and let me know if there's anything I can do to help."

Timing	Channel	Context & Messaging
Day 30	Personal visit	No need to make a formal appointment. Ask if you can drop by, and don't hem and haw when you get there. Be direct, and say something like, "Hey, the first reason I came by is to check on you. Are you good? Do you like the purchase? Are you glad you did it? Are you getting any feedback?" Then, you're going to segue into a referral ask: "Now, the second reason I came by is: Who do you know? Who do you know that would benefit from the same thing you did with me? Who do you know?"

### 3 The First Year of Post-Sale Follow-Up

Now, we're going to take a look at how we can do more—how we can put into play two years of strategies and tactics that will allow us to absolutely dominate our landscape.

Timing	Channel	Context & Messaging
Month 3	Handwritten note and phone call	Put together a heartfelt note that thanks your customer for their business and reminds them of your cell number if they have any questions. Then, pick up the phone and call. Messaging: "April, I'm sending you a note, and I'm calling to make sure I have the right address for you. And while I have you on the phone, it's been 90 days since your investment..." Look for any roadblocks or challenges you can help your customer solve.
Month 6	Phone call	This is the "value your opinion" call. Ask your customer to do you a personal favor that has nothing to do with the business you've done together. For example, ask for feedback on a local charity they're involved with, or ask for advice on starting a collection in their area of expertise.
Month 12	Phone call	Theme: "Happy Anniversary!" Messaging: "It's been a year. The reason I'm calling is to wish you a happy anniversary. I'm going to tell you, 12 months ago today, I was a better man for meeting you. Okay, any questions? What do we have coming up? What can I do for you? Anybody I can help you with? Anything at all? I'm at your service."

#### 4 The Second Year of Post-Sale Follow-Up

Timing	Channel	Context & Messaging
Month 15	Personal visit	<p>If your customer is in your town, bring over coffee, donuts, bagels, anything, really. Messaging: "I'm in the neighborhood. I'm close by. The reason I'm coming by is because I just wanted to stop by, say hello, and make sure everything's okay. I want to be sure your business is doing well, and I want to be sure your family's well." In other words, the message here is: <i>I care</i>.</p>
Month 18	Handwritten note and phone call	<p>First, write your customer a note:</p> <p>Dear _____,</p> <p>The reason I'm writing to you is that it crossed my mind that you are one of my valued customers.</p> <p>I'm thinking about you and your family.</p> <p>I trust all is well. Call me if you need anything: 555-555-1234</p> <p>Be great.</p> <p>[Your Signature]</p> <p>(Print your name so it's legible!)</p> <p>Then pick up the phone, and tell your customer that you're checking to make sure that you have the right address. It's a great excuse for a follow-up, it's a great chance to update your CRM, and it's a great chance to make contact. And, if the conversation is going well, ask for a referral right then and there: "Who do you know?"</p>

Timing	Channel	Context & Messaging
Month 24	Phone call	<p>Your final follow-up will be the three-question call. Pick up the phone and call your customer. Messaging: “The reason I’m calling is that it’s been two years since we finalized your investment, and I want to get some feedback from you. I have three questions that’ll take less than two minutes. Can you give me that time?”</p> <p>Once they say yes, you ask the three questions:</p> <ol style="list-style-type: none"> <li>1 “Would you do business with me again?”</li> <li>2 “When can we do it again?”</li> <li>3 “Who do you know other than yourself that I can assist?”</li> </ol>