

Marketing Follow-Up Calendar & Planning Tool

For an automated system to handle your follow-up efforts look to MarketSharp. Give us a call at 1-800-335-4254 we'd be happy to put your follow-up on auto-pilot!

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Motivate Unsold LEADS with Consistent, Effective Follow-Up Marketing (10 Simple Follow-Up 'Touches')

Don't let leads fall through the cracks after your first visit. Win them back with a proper follow-up program. Below you'll find an example of a 'lead follow-up process' you might use to revive your unsold leads. You'll find soft 'touch' ideas to implement like thank you notes, post-appt feedback, postcard mailings, email updates, special occasion announcements, etc. included in the calendar.

An Example of a Systematic Follow-Up Marketing Calendar

A Sequential Multi-Step Marketing 'Touch Campaign':

1. Pre-Appointment	(Day -3)	Mail or Email an appointment reminder letter plus give the lead a personal confirmation phone call reminder
2. Post-Appointment	(Day 2)	Mail or Email a thank you note for appointment
3. Week One	(Day 7)	Mail Lead follow-up Survey requesting post-appointment feedback
4. Week Two	(Day 14)	Email or Follow-up with a phone call as a reminder to return Survey
5. Week Three	(Day 21)	Follow-up phone call to get survey results or to review collected survey information
6. Month One	(Day 28)	Email lead to see about any additional questions or requests and include a link or list of customer testimonials
7. Month One & Half	(Day 42)	Follow-up phone call as a courtesy to
8. Month Two	(Day 56)	Depending on lead status...
		A) If you gave a quote - Mail a Power Proposal letter with copy of quote to reinforce initial quote B) if a quote was not offered - Mail educational information like a FREE Report like "How to Choose the Right Contractor For Your Home Improvement Project"
9. Month Two & Half	(Day 70)	Mail postcard to reinforce initial quote or FREE Report information and offer another opportunity to meet for a consultation
10. Month Three & Beyond	(Day 84)	Combine Mail and Email to send consistent monthly follow-ups like special offers, educational material, birthday greetings, price increase notices, product specific promos, newsworthy company updates etc. as an ongoing way to nurture your leads.

OK – there's a lot that could be said about every step in the follow-up process. And even though this process seems tedious and time-consuming... guess what? It works! Period. When you begin to properly follow-up with your leads using education, repetition and variety, your numbers will absolutely shoot through the ROOF! (Pun intended!)

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Systematic Follow-Up Program

Do you have a plan to follow-up on your unsold leads that goes beyond the typical 'rehash' phone call? If not, you are missing a ton of business. Use the planner below to jot down the process you will implement to maximize your lead conversion. Remember, there are two types of follow up...**sequential communications** such as thank you notes, surveys, etc. and **ongoing targeted communications** like price increase notices, product specific promos, etc.

Sequential Communications	Type (email, letter, postcard, phone call, etc.)	Ongoing Targeted Communications	Type (email, letter, postcard, phone call, etc.)

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