

7-DAY FOLLOW-UP PLAN **PRE-TOUR**

*Follow up for Hot Lead – **SPEED TO LEAD***

DAY
1

Call upon receipt of lead and again later in the day if no answer. Leave one voicemail. Send introductory email and ask ED to text. Send personalized quick video saying hello and pointing out you reached out today. Contact the referral source.

DAY
2

Call lead and again later in the day if no answer. Leave one voicemail. Send email and ask ED to text.

🚩 **Goal:** Secure a Virtual Tour.

DAY
3

Send OneDay video that's **NOT** a virtual tour!
Examples: Resident testimonial, DH introduction, Lively Mobile, etc.

🚩 **Goal:** Secure a Virtual Tour.

DAY
4

ED call and send ED introductory video. Contact the referral source.

🚩 **Goal:** Secure a Virtual Tour.

DAY
5

Call lead and again later in the day if no answer. Leave one voicemail. Send email and ask ED to text. Mail **handwritten note** if you have the address.

🚩 **Goal:** Secure a Virtual Tour.

DAY
6

Send OneDay video that's **NOT** a virtual tour!
Examples: Resident testimonial, DH introduction, Lively Mobile, etc.

🚩 **Goal:** Secure a Virtual Tour.

DAY
7

Contact referral source and schedule follow-up one week from today.

🚩 **Goal:** Secure a Virtual Tour.

7-DAY FOLLOW-UP PLAN POST-TOUR

REMINDER: Use OneDay videos, porch visits, handwritten notes, quarantine kits and other WOW gift follow-up.

DAY
1

Virtual tour takes place.
Handwritten thank-you card mailed from DSM.

DAY
2

Follow-up call from Executive Director.
Leave voicemail if necessary and send a follow-up email.

DAY
3

Porch visit and/or WOW gift scheduled.
Call them to confirm or to let them know the gift is on its way.

DAY
4

Porch visit completed or WOW gift delivered.
Contact referral source.

DAY
5

Follow-up call to see if the WOW gift arrived.
We create joy through acts of generosity!

DAY
6

Invite to a virtual event. We need to keep them engaged after the virtual tour.
Examples: Team Zoom meetings with prospects and depositors, Facebook LIVE entertainment and education series, personalized PowerPoints, etc.

DAY
7

If still no commitment, then offer other alternatives such as an additional virtual tour, introduction to their loved one, assistance with move preparation, respite stay, etc.