

# 7-DAY FOLLOW-UP PLAN PRE-TOUR

**REMINDER:** Use SalesMail videos, text messages, and handwritten notes in addition to phone calls and emails.

DAY  
1

Call upon receipt of lead and again later in the day if no answer. Leave one voicemail. Send introductory email and contact the referral source.

🚩/Goal: Complete Full Discovery and Secure a Tour.

DAY  
2

Call lead and again later in the day if no answer. Leave one voicemail. Send email, text, or SalesMail.

🚩/Goal: Complete Full Discovery and Secure a Tour.

DAY  
3

Call lead and again later in the day if no answer. Leave one voicemail. Send short email confirming that the lead has received the information.

🚩/Goal: Complete Full Discovery and Secure a Tour.

DAY  
4

Send a SalesMail and contact the referral source to discuss the status.

🚩/Goal: Complete Full Discovery and Secure a Tour.

DAY  
5

Call lead and again later in the day if no answer. Leave one voicemail and send email. Concierge may assist in writing and mailing a handwritten note if you have the address.

🚩/Goal: Complete Full Discovery and Secure a Tour.

DAY  
6

Text the lead!

🚩/Goal: Complete Full Discovery and Secure a Tour.

DAY  
7

If no voice-to-voice contact today, continue weekly follow-up for the next three weeks. Follow up every other week from 31–60 days, then follow up once every 60 days through six months (180 days) once cold.

🚩/Goal: Complete Full Discovery and Secure a Tour.

# 7-DAY FOLLOW-UP PLAN

## POST-TOUR

### REMINDER:

*Use SalesMail videos, home visits, handwritten notes and other WOW gift follow-up. Don't forget to fill out the ED Follow-Up Guide as well.*

#### DAY 1

Tour takes place.  
Handwritten thank-you card mailed from DSM.

#### DAY 2

Follow-up call or SalesMail from Executive Director.  
Leave voicemail if necessary and send a follow-up email.  
DSM and ED planning session to discuss next steps.

#### DAY 3

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

#### DAY 4

Home visit completed or WOW gift delivered.  
Contact referral source to discuss the status.

#### DAY 5

Follow-up from WOW gift and/or home visit.  
Discuss with the prospect how to partner together, remove obstacles and next steps.

#### DAY 6

Invite to a Vibrant Life activity that relates to their interests or upcoming event.  
**Examples:** happy hour, prospect event, guest speaker event, etc.

#### DAY 7

Team meeting to brainstorm next steps personalized for their situation.