


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 DOS.

DAY
2

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