



KICK ASS

FOLLOW UP TEMPLATES
TO GROW YOUR BUSINESS



YELLOW DOG
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CONSULTING

Your Follow Up Plan

So you finally carved out time to attend a networking event. Fantastic! You probably met some great people, right? And I'm guessing you picked up a few business cards while you were there. **Excellent!**

You've left the event feeling pretty jazzed after meeting potential clients and several people you want to stay connected with. Now you've got a pile of business cards and notes stashed in your pockets, purse and notebook. **Now What?**

I have a system that will make sure you know EXACTLY how to follow up with each business card and how to make attending the event worth the effort.



Tips for Networking Success

Prepare for Follow Up

Before I go to a networking event, I like to schedule 15-30 minutes for follow up in my calendar. **YES, put follow up on your calendar.** This ensures those business cards don't magically appear in your backseat two weeks later followed by an "oh crap" and your forehead on the steering wheel. Don't leave this to chance by thinking you're going to get to it. You won't, despite your best intentions.

I use this tip all the time. As soon as I put an event in my calendar, I also schedule 15 minutes for follow up later in the same day or if it's an evening event, then I schedule time to do it the next day.

Pro-Tip: Want to reduce your follow up time to zero?

Schedule a meeting with a new contact while you're still at the networking event. This one habit saves me hours of phone tag and back-forth emails. Why wait and risk the email or voicemail "tag" that can cost you a week of back and forth communication?

Strike now and get on their calendar!

Do the Follow Up

If you tell someone you will send them a referral or a proposal, do it. And do it the next day, not a week later. You're trying to make a positive impression, right? Be the pro who actually keeps their promises.

Having a crazy week? Unsure if you can get to them right away? Try saying this:
"I'll send ___ over to you by the end of the week. The next few days are a bit crazy."

It's okay to use this tactic to give yourself some wiggle room, but you absolutely must do it within the time frame you promised. And then leap over tall buildings to get it to them before your competition swoops in.

Keep Them in Front of You

The first thing I do when I get back from a networking event is empty my pockets and purse onto my desk. This makes sure all those business cards will be staring me in the face first thing in the morning, keeping me from "forgetting" that I need to follow-up right away. It's a great way to begin forming the habit of follow up.

Pro tip: Refill your business card holder at the same time since you probably just ran out...

Keep It Simple

Follow up shouldn't take you a TON of time to do unless you had real conversations with 20 people. **And now that you have these handy templates it'll go even faster!**

When you're networking you'll meet a variety of people but typically they fall into three categories: **Potential Clients, Potential Referral Partners and Not Right Now Connections.**

- **Potential Clients:** Jump on this one immediately, while you're still fresh in their mind. Scheduling on the spot is still the best way to keep in front of them. If it didn't work out that way, following up the next day is ideal. **I've written a template for you so you know just what to say.**
- **Potential Referral Partner:** This is someone you hit it off with, creating the possibility of a mutually beneficial referral relationship. Alternatively, this might just be someone you want to get to know more and maybe it's not a business connection but your new BFF. **I've written a template for scheduling that coffee meeting you talked about.**
- **Not Right Now Connections:** These are people you met briefly at your networking event, they were nice, but there wasn't the instant connection or immediate interest. You got their card (or they may have forced it on you...) and don't need to meet with them 1:1 right now, but it wouldn't hurt if you stayed connected with them. **THIS is where social media is handy!**

Connect on Social Media

LinkedIn

I connect with everyone I meet on LinkedIn. Make sure to write a personal note here!

“Hi XXX, it was so nice to meet you yesterday at Y Event, I'd love to connect here to keep in touch!
All the Best, (your name)”

Yep, it's just that easy, that quick and painless. This way you have their most recent contact information if they change jobs or you forget to file their contact information in any other place. If you are good about updating your LinkedIn regularly they'll see you pop up in their feed and may start to realize how rad you are and that they should hire you!

Twitter

If their Twitter handle is on their card and you're on Twitter, start following them to see what they talk about. You might discover a mutual love of the Seattle Seahawks or that you both like to live tweet reality TV shows. And if they only ramble on about how amazing their Traeger grill is, you can unfollow them in a couple of days.

Facebook

If you're interested in what they're up to and they have a Facebook Business Page, become a fan! Start keeping an eye on what they're talking about and join in the conversation to get to know them better!

Pro tip: Connect via social media with everyone...why miss the opportunity to expand your network?

Recommended Follow Up Schedule

Within 1 Business Day

Make an initial contact to request an appointment and/or send what they requested or you promised you would send them. Right after this, you should connect on social media. You can call if you're better on the phone and if you get their voicemail then send a follow up email. Mention in the message that you're sending an email so they can respond by email if they prefer.

4-5 Days Later

If you sent an email mid-week, the following Monday is a good rule of thumb for the second contact. Reply to the original email you sent to be sure they received it (and make sure to check your spam first) . At this point you can call them (if you haven't already) or send another email. **I wrote you a template for this!**

One Week Later

If they still haven't responded to your initial contact and you don't want to nag them, connect on social media (if you haven't yet). Use the same language as you did for the folks you don't need to meet with; just get your name in their inbox one more time in a different way that's not nagging them.

Two Weeks Later

Typically, if they haven't followed up at this point, it's on them. I usually wait until I see them at a future networking event. If you really wanted to connect with them, send a new email checking in, as if you never emailed them before. **If this doesn't do it, let it go.**



Let's Do This. You've organized your business cards and know who you want to follow up with. Now, it's just a matter of knowing what you should say and when. Lucky you: I've written four templates that take out the guesswork and make following up super simple. **Just follow these templates and you'll CRUSH IT!**

1. **Your Next Great Client** - This is the initial email you will send to someone after you've met and they've expressed interest in what you do.
2. **Prospective Colleague/Strategic Partner** - This email is to meet up with someone who might refer your next great client, or you could be the source of THEIR next great client.
3. **No Response** - Sometimes people don't respond to that first follow up email. This template makes it easy to know what to do (and say) next.
4. **Hire Me!** - This email is for after you've met, they have everything they need to make a decision and they're dragging their feet. This template provides a few options for how to gracefully land that deal.

One more prize for being awesome: I created a handy spreadsheet you can use to track your follow up just in case you don't already have a system that you use consistently. If you already have a system in place for this, great. If not, here's a link to my spreadsheet with each follow up step:

[SCHEDULE SPREADSHEET](#)

Your Next Great Client

This is an email you would send to someone you met while networking who mentioned they were interested in hiring you or learning more so they can decide to hire you. This opportunity is potential money in your pocket, so make sure you **follow up ASAP, no later than one business day**. Don't give them time to forget about you or for your competition to follow up first!

This kind of follow up email needs the following components:

- A friendly greeting
- A reminder they were interested in working with you
- A meeting request

I've given you options for each component and a bit of wiggle room here. You can do this!

Subject: (event) Follow Up **OR** Nice to meet you at (event name)

A FRIENDLY GREETING AND REMINDER

Hi XXX,

Pro Tip: Always use the name they put on their business card here, unless they told you to call them something else. If you call me Liz or Beth I will delete the email before I read the rest.

It was so nice to meet you yesterday at **Name of Networking Event**. I really enjoyed our discussion about (I'd put something personal here - a comment about what they do or something you two discussed to personalize it)

You had mentioned you **needed help with (your service)** and I wanted to set up a time for us to talk more and see if we might be a good fit.

This sentence can go a few different ways. You mentioned you...
...were looking for a massage therapist downtown
...needed help with your marketing
...wanted to learn more about (the product line you sell)

OR

When we were talking, you mentioned you were looking for help with your **marketing** and I wanted to see if we could set up a time to talk more and see if we might be a good fit.

I live and work in Pawnee but I am often in Eagleton. Next week I am in Eagleton on Tuesday and Thursday for lunch appointments and could meet before or after if that might work for you. Let me know where you're located and we can find a time and place to meet.

Let people know where you live/work to make it easier to meet sooner, rather than later. I often find folks mention they'll be in the next town over or in my town and could meet on X date/time, or I realize I'll be in their neighborhood in a week and could meet with them before/after that appointment.

OR

You mentioned you live in Eagleton and I have an appointment next Tuesday in the area. I could meet before or after my meeting at 10 am or 1:30. Would either of those times work for you? If not, let me know a couple of meeting times that work for you during the next couple of weeks and we'll get this set up!

Location and date setting are the two things that make it hardest to set up a meeting, so I like to throw out a couple of times to get the ball rolling.

OR

I'm a big fan of meeting virtually to save us both time and gas money. I have availability on Tuesday and Thursday next week between 10-4. Let me know if one of those days might work for you.

OR

If you have a specific initial consult/offer for your service:

I know I mentioned a bit about (the work you do/service you offer) - and I wanted to follow up with you since you mentioned you were interested. I'd love to offer you an introductory session to try it out!

Be sure you clarify whatever "it" is. **This reminds them what you're offering and has them already visualizing trying it out.**

Send me three dates and times that work for you in the next couple of weeks and we'll get you scheduled!

OR

Here's a **link to my schedule** where you can find a time that works for you!

I'm looking forward to connecting further!

Have a great rest of the **day/afternoon/week**,

Your signature

SIGN OFF WITH YOUR CONTACT INFO SO THEY DON'T HAVE TO FIND YOUR CARD!

Company Name

Phone

Email

Website

Prospective Colleague/ Strategic Partner Follow Up Template

The purpose of this follow up email is to schedule time to meet with a prospective colleague or strategic partner so **you can really learn about each other**. This is NOT a hidden agenda meeting to get them to sign up for your direct sales company or hire you as their financial planner (sorry, but you know why you get a bad rap...)

The purpose of this meeting is to connect with someone you had a connection with who works with the same target market and that you might be able to refer to one another.

This kind of follow up email needs the following components:

- A friendly greeting
- A clear reason to meet
- A meeting request

I've given you two options and a bit of wiggle room here. You can do this!

Subject: (Event) follow up OR Nice to meet you at (event name)

Hi (Name) -

It was so nice to meet you yesterday at **Name of Networking Event**. I really enjoyed our discussion about (I'd put something personal here - a comment about what they do or something you two discussed to personalize it).

Examples:

What a small world that we live a half mile apart!

Thanks for your recommendation to check out Jessica Jones, I've added it to my Netflix queue.

I can't believe you dated my husband! (This, obviously is a bad choice!)

It's always great to meet another Mariners fan!

As we were talking, I got the impression that we work with a similar client base. I'd love to learn a bit more about your work and how it might help my clients. Do you have time to meet for coffee in the next couple of weeks?

OR

You mentioned you work with clients **in career transition and since I also work with these folks**, I thought it might make sense for us to connect and learn how we might be able to help each other. Do you have time in the next week or two for coffee?

Be specific whenever you can!

I live and work in **Pawnee** but I am often in **Eagleton**. **Next week I am in Eagleton on Tuesday and Thursday for lunch appointments so could meet before/after if that might work for you.** Let me know where you're located and we can find a time and place to meet.

OR

You mentioned you live in **Eagleton** and I have an appointment next **Tuesday** in the area. **I could meet before or after my meeting at 10 am or 1:30 pm.** Will either of those times work for you? If not, send me a couple of dates/times that work for you in the next couple of weeks and we'll get this set up!

I'm looking forward to connecting further!

Have a great rest of the **day/afternoon/week**,

Your signature
Company Name
Phone
Email
Website

No Response Follow Up

They didn't respond!

We always wonder WHY someone isn't responding to our email. Was it something I said? Do I smell? Did I have something in my teeth? Are they NOT a fan of binging Netflix like me?

People are busy, and an organized inbox or timely follow up is not everyone's strong suit. So what do you do? Well, you follow up again—just not too quickly, and not too frequently.

Usually what happens is they're going to respond in one of two ways: either some form of "I hated meeting you and never want to see your face again" or "I've been swamped with a project and promise I'll get back to you by the end of the week." If it's the first one, better to know now, but most of the time they're just busy.

1) Check Back Early in the Week

If you sent your follow up email on a Thursday and haven't heard from them by the following Monday or Tuesday then find the email you sent, and forward it with a message like this:

"Hi Sarah, Just a quick check-in to be sure you received this email. I'd love to connect in the next week or two if you'd like!"

I often find that people use their inbox like a to do list, but what actually happens is that your emails get pushed down as the week progresses. This friendly "check-in" moves your original email back up to the top.

2) Give Them a Call

Calling never hurts, and some people are more comfortable on the phone than writing an email. If you like the phone, and I know many people don't, I would suggest calling 4 - 5 days afterwards instead of emailing. If you have a program you want to get them signed up for, I'd give them a call letting them know the deadline.

If you talk to them, you're set. If you get their voicemail, reference the email you sent after you met them last week and that you want to set up a time to connect. And, I often say I'll follow up with an email in the message. That way, if they prefer email over the telephone, you make it easy for them to get back to you in their preferred format.

3) Connect on Social Media

In my overall plan I have suggestions for connecting on social media. If you haven't done it automatically with everyone you've met, then now is a great time to start. And it could be they prefer Facebook to email or phone. Again, the idea is to remind them that they met you and that you're interested in connecting.

Pro Tips for Success

Timeliness

I like to give folks just under a week to respond. I find that people like to clean up their inbox by the end of the week, and many small business owners do it on the weekend. Follow up too soon and they feel pressured. Wait too long and you've lost them. I wait 4 or 5 days and then follow up again, either with an email or phone call. I usually start with an email and then a follow-up email or a phone call.

Calling

Assume everyone is running their business on typical business hours. Don't call at 7:30 pm while they're getting the kids to bed or on a Saturday because you're catching up. Stick to standard business hours unless they say otherwise.

Texting

No. Just don't. Unless they explicitly say "I'm better at texting" or "Text me to set up a time," don't ever start your communication with a text. If they text you first or ask you to text them, then follow the business hours rules and don't text at 10 pm.

Don't Facebook Message them. It's not professional!

Frequency

I mix it up. I usually send an initial follow up email and then a second email. If I haven't connected on social media, I'll do that then. Again – if there's a deadline you want them to meet, make a friendly check-in phone call. The fact is, some people don't respond unless there is a deadline!

Could You Please Hire Me or Dump Me Already?

When someone asks for a quote, a sample product, a list of services or rate information, that's what we call a "buying signal." Yes, we want them to hire us, but let's not be TOO desperate.

Keep in mind that we all get busy and some people don't circle back. Honestly, they've got so many things on their mind already, and your bank account probably isn't on their list. The last thing anybody wants is you calling or emailing every other day asking for money. So what to do? Here's what I recommend:

Set Expectations Up Front:

"Here's my rate sheet. Please let me know if you have any questions about getting your project started. **I'll circle back with you next week if I haven't heard from you.**"

Alternatively, you can **ask them up front:**

"When would be a good time to talk about this?"

"I know you need to talk with your partner about it, let me know when I should follow up with you. I don't want to accidentally harass you!"

4-5 Days Later

I reply to the email I sent with my rate information and say:

"Hi Jack, I just wanted to touch base on this and see if you have any questions. I'm free this Thursday if you want to set up time to talk more about this."

"Hi Sarah, I gave you some samples to try out when we met last week. What did you think? I know that not everyone loves everything (ewww kale smoothies...), **I'm curious what worked for you and what didn't.** I'd love to set up time to chat about it this week. What day works for you?"

"Hi Mike, I know I sent you a lot of information and it can be overwhelming. Do you want to set up time this week to chat about it? I'm free on Thursday or Friday morning. Let me know which day works best for you."

As much as we all love making money, we don't always like giving it away. They might be waiting for a project to close on their end, and not everyone wants to say that. Sometimes I'll break the ice by saying, "Hey, I know this is a lot of information and you have a lot going on," and sometimes I'll let them bring it up. It really depends on what feels right.

Making clients feel good about how this conversation ends now makes it more likely they will circle back to you (and not your competitor) when the timing is right for them.

Having a follow up system in place means the follow up will actually happen, which means more business will happen! I know this is a lot of information, templates and ideas to absorb.

MY PROMISE: If you start doing your follow up consistently, **you WILL see your business grow.**

Here are the key guidelines:

- Prepare to follow up **BEFORE** you attend the event.
- Do your follow up as soon as possible and **within 1 business day.**
- Connect on social media** to stay in touch, and as one more touch point.
- Follow up. Follow up again. And when needed, follow up a third time.**

Woof!
Elizabeth & Norm

