



Following up: The easiest way to increase top line revenue

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Today's speaker



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Today i'm going to share...

5 Reasons why you should follow up

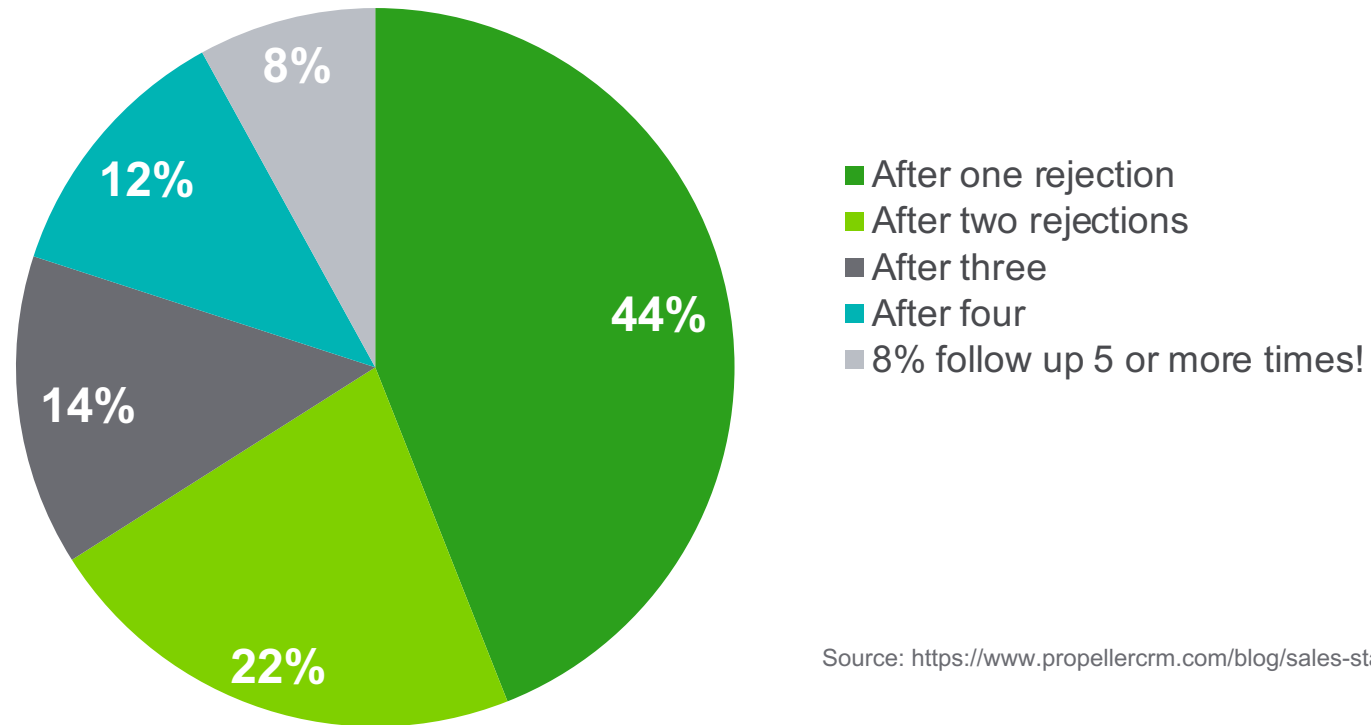
3 Different groups of people you should be following up with

How to follow up with each group

Did you know 80% of sales...

...require five follow-ups after the initial contact, but 44% of people give up after ONE.

When do people stop following up?



Source: <https://www.propellercrm.com/blog/sales-statistics>

Having a solid follow-up plan is crucial to your long-term success.



Even with the most qualified prospects and dream clients, you might not get the YES on the spot the first time around.

If you want **long-term relationship bliss** in business, you have to stay the course.

The results I got being “professionally annoying”



Pitched Season 4 of Shark Tank

Got into 10 Vitamin Shoppe Locations where they invested \$1M

Got our protein bars into Costco!

Worked with Pro MLB, NFL & NHL teams



5 Reasons WHY You Should Follow Up!

Reason #1: There are a LOT of reasons why someone might say NO.



Most likely, NONE of them have to do with you!

Life gets busy! If someone says NO to working with you right now, it almost never has anything to do with you.

Circumstances could change or timing could be better at a future point in time.

Reason #2: You'll increase trust in your relationships

Follow Up + Genuine
Communication

Equals More



KLT factor
Reciprocation
Loyalty
Referrals

....which equals more \$\$\$ for you!

Reason #3: Finding new leads costs time & money



Following up can take a little bit of time, but it doesn't require any money up front or out of pocket.

Finding NEW leads and contacts will always take more time and cost more money.

PLUS, reaching out to people who already know, like, and trust you will give you MUCH better results.

Reason #4: Following up is **EASY** (and efficient!)



Once you have a follow up system in place, you'll save:

Time

Money

The stress of constantly feeling like you always have to find new leads

Reason #5: Following up can make you a lot of money



And isn't that what every business owner wants?!

If you're not regularly following up, you're leaving money on the table for someone else (maybe your competition!) to pick up.

OR you may be missing out on providing a service that your current clients want and need (and would be happy to pay you for).



WHO to follow up with?

You should be regularly following up with...

Group 1

Potential Partners
& Referrers

Group 2

Prospects
& Potential Clients

Group 3

Current Clients Who
Are Already Sold

Group 1: Following up with potential partners and referrers



Sales Karma is REAL!

Building relationships with people who do what you do, or who compliment what you do, will increase your value.

Regularly keeping in touch with potential partners & referrers provides a support network and lifeline for your business.

Follow up with potential partners & referrers [Group 1]



- Get a cell phone # & email address
- Schedule a first follow-up call after you meet or have been referred to them.
- Schedule in person/video chat with them if possible!
- Send an email & text message reminder about the follow-up call one day prior.
- Send a handwritten “Thank You for your time” card via snail mail.

Group 2: Following up with prospects and potential clients



REMEMBER...If someone says NO to working with you right now, it almost never has anything to do with you!

You want to be on their mind when they're ready to say YES.

Follow up with potential clients & prospects [Group 2]



- Schedule a first follow-up call BEFORE you end the meeting.

- Send a thank you email & hand-written card immediately.

- Send an email reminder about the follow-up call one day prior.

- Send an off-topic email in the meantime. 3 weeks or 3 months after your initial meeting.
- NO business talk, no pitch.

Group 3: Following up with already sold & current clients



It is MUCH easier and more cost effective to retain your current clients and sell them new/additional services than it is to get new business.

You should be treating current clients like gold and letting them know they are important to you!

And they are great to ask for referrals in the future.

Follow up with already sold & current clients [Group 3]



- Send a thank you email & hand-written card immediately after they buy from you.
- Follow up either every 90 days or 6 months depending on your business.
- BE CONSISTENT! Set appointment reminders or automate when possible/appropriate for your business.
- Send an off-topic email on day 45 or at the 3-month mark



When NOT to Follow Up With a Prospect!

They can't answer key questions



If your client doesn't know what they want, YOU CAN'T HELP THEM.

Do they have a clear vision of what they want?

Are they the final decision maker?

Do they feel the need to take action NOW (or soon)?

Do they see your value in what you are offering?

They don't see your value



Some of the cues to watch out for if they do not see your value are the following:

They only ask about the price

They keep asking for discounts

They're not moved by testimonials or client reviews

They tell you they're not sure they need you

You simply aren't a good fit



Sometimes you just know it's not going to work.

Don't let a scarcity mindset or moment of weakness make you work with someone you know isn't the right person for you!

The energy connection in your meeting wasn't what you want in your life!

IT'S NOW TIME TO TAKE ACTION!

Pull out your cell phone &/or laptop

Block out 30 minutes once a week right NOW to start your follow up weekly plan

Set up the 30 minute block for a recurring appointment weekly!

Have 10 minute blocks set out for each group in follow up

and... Most importantly... Be consistent!

Consistency is what will set you apart. If you're always showing up in a genuine way, you'll be the one people remember first.

Be memorable!

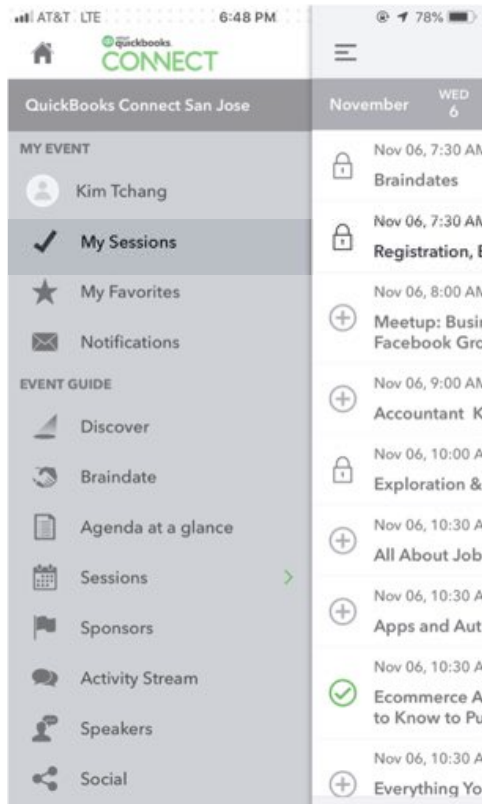


Questions?

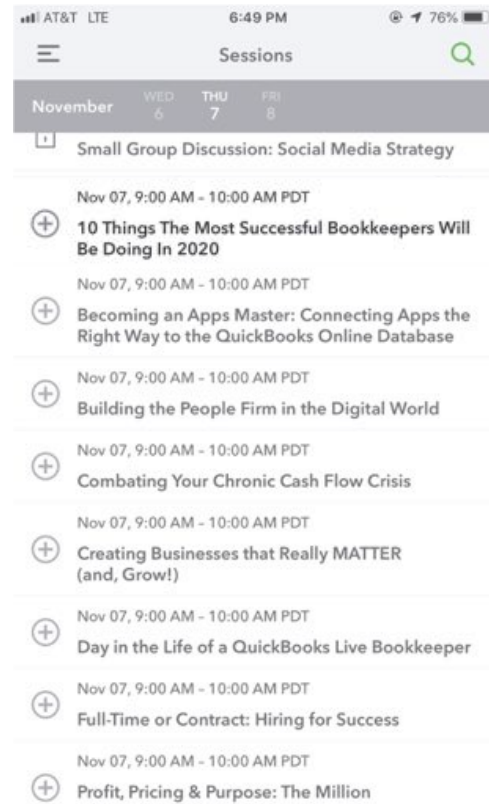
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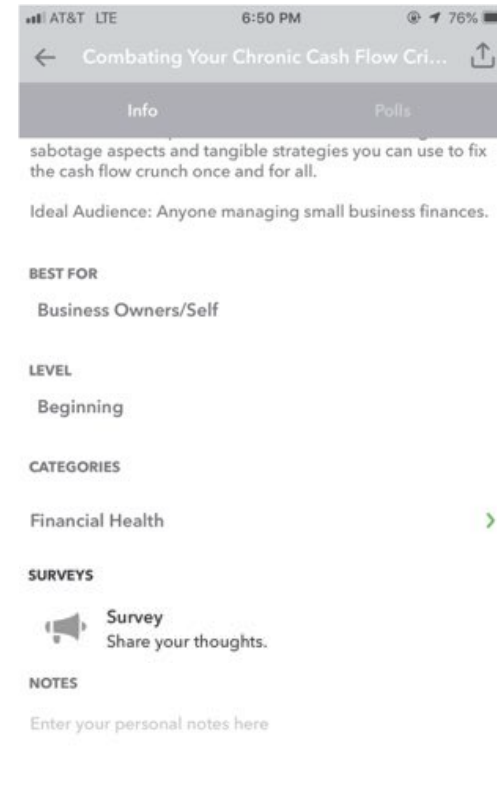
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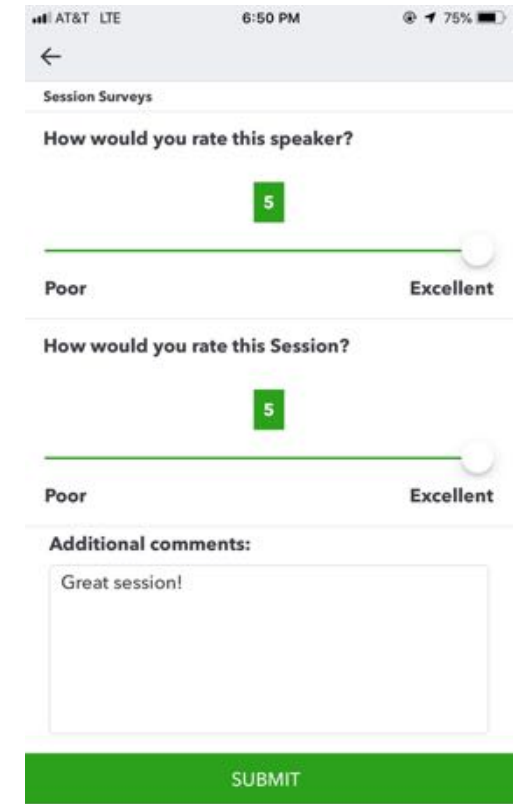
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<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. The date 'November 7' is highlighted, with 'November 6: Accountant Day' and 'November 8' also visible. A 'Print Agenda' link is in the top right. Below the header, a paragraph describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' A search bar labeled 'Search for sessions' is present. Below the search bar are filter buttons: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health', followed by an 'Expand all +' link. The agenda list shows sessions for November 7. The first session is 'Registration, Breakfast & Exploration' from 7:30-7:00 am. The second is 'Braindates' from 7:30-10:30 am, described as a new feature for booking one-on-one time with experts, with a 'Learn more' link. Below this is 'Yoga' from 8:00-8:30 am. The 'Breakout Sessions' section starts at 8:00-8:45 am and includes: 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each session has a '+' icon to its right for more information.



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THE
FUTURE