CHECKLIST

Follow-Up That Feels Good

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This checklist outlines a service-minded approach to following up with potential clients, based on building genuine relationships and delivering consistent value rather than using aggressive sales tactics. Following this sequence helps maintain authentic connections while moving relationships forward naturally.

1. **Initial Follow-Up (First 48 Hours)**

   - [ ] **Send same-day recap email**
     Summarize key discussion points from your conversation to demonstrate active listening and maintain momentum while the interaction is fresh.

- ☐ **Share relevant resource within 2 days**
  Provide a helpful article, template, or tool specifically related to challenges discussed, establishing your commitment to their success beyond the sale.
- ☐ **Document key insights in your relationship management system**
  Record specific challenges, goals, and interests mentioned to inform future interactions and ensure personalized follow-up.

2. Value-Building Phase (Days 3-14)

- ☐ **Engage meaningfully with their online content**
  Comment thoughtfully on their social media posts or professional content to maintain visibility without pressure.
- ☐ **Make strategic introductions**
  Connect them with relevant contacts or resources that could help address mentioned challenges, demonstrating your value as a network connector.
- ☐ **Share case study or success story**
  Provide a relevant example of how similar challenges were solved, focusing on practical insights they can apply.

3. Permission-Based Progress (Days 15-30)

- ☐ **Check in with a value-first message**
  Reach out with additional insights or resources related to their specific situation, asking if they'd like to explore further.

- ☐ **Offer clear next steps**
  Present natural progression options based on their expressed interests and engagement level.
- ☐ **Document response patterns**
  Track which types of follow-up generate the most positive engagement to refine your approach.

4. Long-Term Nurture (Ongoing)

- ☐ **Schedule regular value touchpoints**
  Create a systematic approach to sharing relevant insights and resources every 30-45 days.
- ☐ **Monitor and engage with their business developments**
  Stay aware of their company news and achievements, offering genuine congratulations or support.
- ☐ **Create re-engagement opportunities**
  Develop events, resources, or collaboration opportunities that provide natural reconnection points.

5. Relationship Management

- ☐ **Review and update contact records monthly**
  Ensure all interaction notes and follow-up plans remain current and relevant.
- ☐ **Assess relationship progress quarterly**
  Evaluate the development of each relationship and adjust nurture strategies accordingly.

- ☐ **Maintain clear exit points**
  Respect boundaries by providing comfortable ways to decline further engagement while keeping doors open for future opportunities.

Remember to adapt this sequence based on individual responses and relationship dynamics while maintaining consistent value delivery throughout the process.