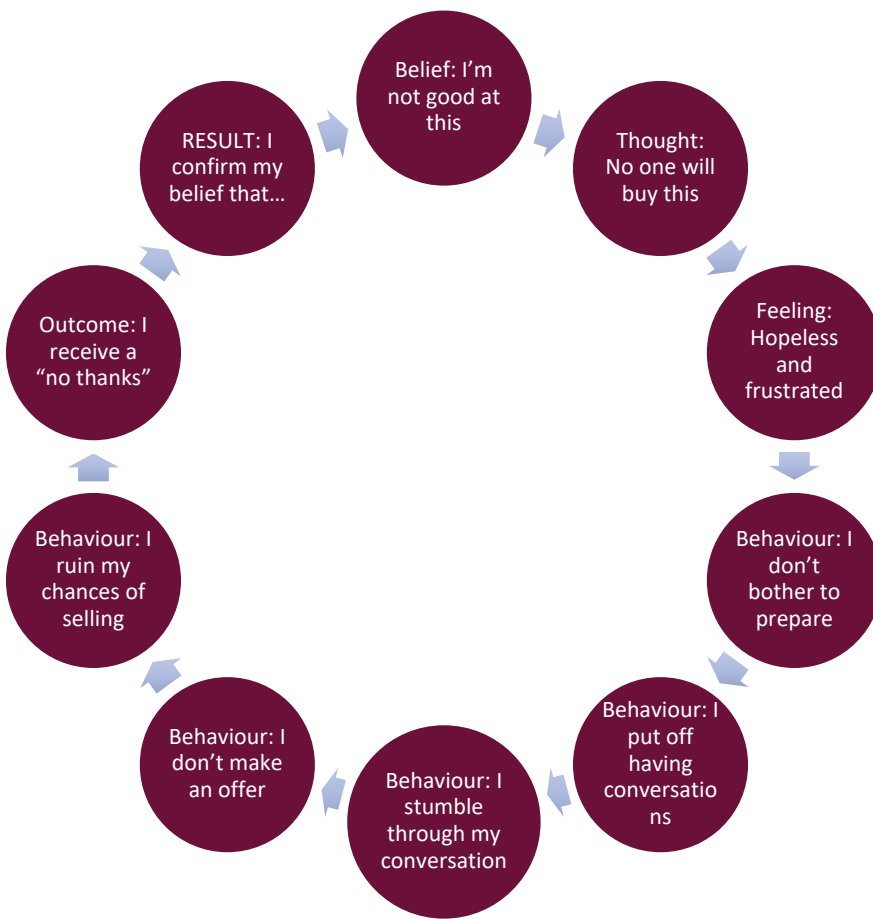


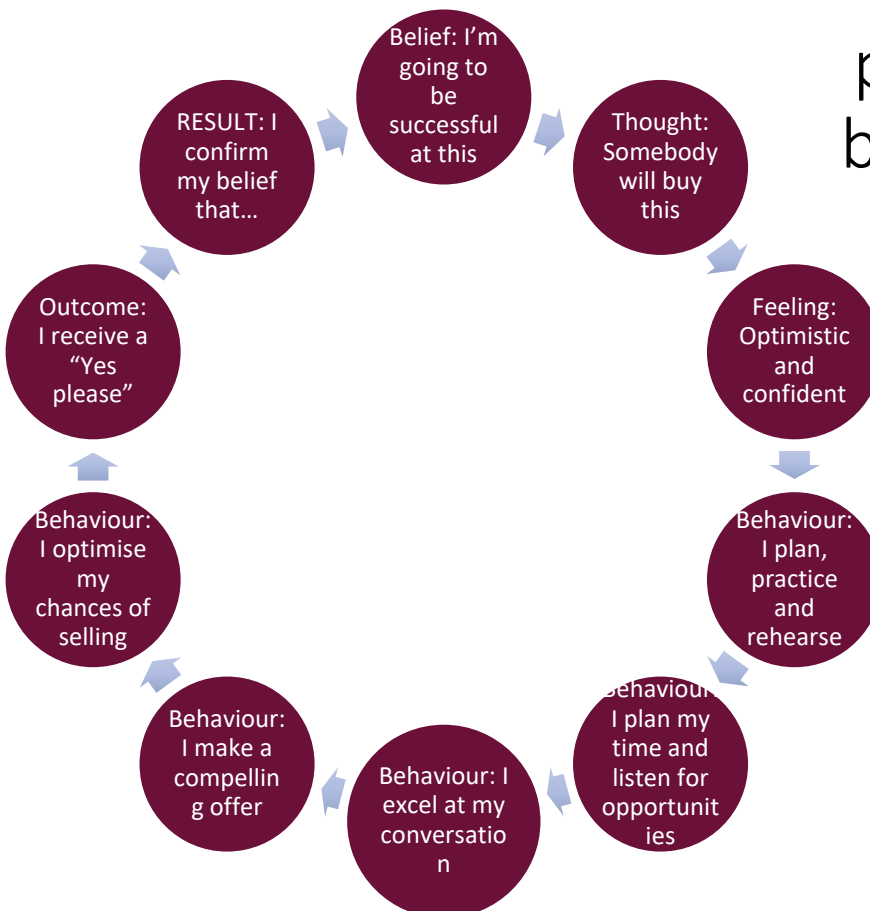
How to Follow Up on Proposals Gracefully

Workbook

How we sabotage our offers



How high performance becomes self-fulfilling?



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Permission Based Follow-Up

At the end of every meeting, know what comes next, and who is going to do it. For example as you wrap up the meeting:

"Today is Thursday. I'll call you back on Monday." I make sure that I understand that they're going to call me on Monday

Then, very simply say, *"If I don't hear from you by the end of the day on Monday, as a courtesy can I follow up with a call to you on Tuesday?"*

When You Call on the Phone

When they answer the phone say, *"Hi, this is [my name from my firm]. As promised, this is the courtesy phone call I said I would have when we spoke last week."*

[PAUSE]

I'm calling to see if you have any questions about the proposal.

[PAUSE – answer any questions they have]

Would you like to go ahead?

1. Shows them that you are true to your word. When you say you're going to follow up, you will follow up. It's professional.
2. Demonstrates that you really do care about them and what their decision is. When they spoke with you, they probably told you it was important to do this work

When You Need to Leave a Voicemail

"This is [your name] from [your firm]. This is the courtesy follow-up call that I promised you. I assume you've got a lot going on. I'll send a quick email just in case you don't get this. I do hope you'll be able to give me a call back on [your number]. I hope you don't mind that if I don't hear from you by Thursday, I'll call you again on Friday."

This is just setting expectations that if you've put in the effort to sit down and have a decent conversation about their needs and provide a proposal, the least they can do is tell you their decision.

How Often to Follow Up

At Least three times

Past Clients

"Dear [client name],

I was thinking of you recently, and wanted to reach out and see how you are.

[write what the trigger was - seeing media around their industry or PR]

"How did you go with [whatever their last goal was]"

"Let me know if it's easier to meet up over a call. Look forward to hearing."

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