

How to Follow Up Gracefully

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CCH Learning:

Hello everybody and welcome to today's webinar, How to Follow Up Gracefully. My name is Susannah Gynther from Wolters Kluwer CCH Learning and I will be your moderator for today. Just a few quick pointers before we get started. In the handout section, you'll find the PowerPoint slides for today's presentation. If you have any sound problems, please check your audio settings, try to toggle between audio and phone, and just a reminder that within 24 to 48 hours, a notification for the e-learning recording will be emailed to you. You can ask questions at any point during the presentation by sending them through the questions box. I'll collate those questions and ask them at the Q&A towards ... Excuse me. Towards the end of today's presentation.

CCH Learning also offers a subscription service, which many people have termed Netflix for professionals. It provides members with access to our entire library of recordings as well as live webinars for a competitive flat fee. That's for over 500 hours of content. For CPD purposes, your viewing is logged automatically. Your presenter today is Dr. Abbie Widin consultant with the Go To Market Company. Dr. Abbie Widin runs a successful boutique consultancy and designs go-to-market. strategies. She coaches sole practitioners and professional firms and helps them identify their highest potential clients, package their services and set their fees. She also helps them stay focused on their most effective business development opportunities. She's also a director of both public and private Australian companies. I'll now hand you over to Abbie to commence today's presentation.

Dr. Abbie Widin:

Oh, thank you very much, Susannah. I've got here through my screen, hopefully you can see that this session will cover.

CCH Learning:

Yes, we can see that.

Dr. Abbie Widin:

That's great. Well, hello everybody, I'm Abbie Widin. This session we're going to look at how to follow up gracefully because what you want to do is not only make sure that any new prospective clients say yes to your proposals, but we also want to encourage past clients to come back and return to you. You've probably heard the phrase the fortune is in the follow up, but how do you follow up on proposals without coming across as needy or greedy or painful in some way or even God help us, desperate?

There's nothing worse than spending a good amount of time on an initial client meeting, this might be 15 minutes meet and greet. It might be an hour long discovery session or it may even be a whole day road mapping session, a paid roadmap mapping session where you plot out, "Here's what we could do and here's how we should do it, and here's how I recommend we proceed." You spend all the time writing up the proposal and sometimes you can get away with them in 15 minutes, but sometimes you spend a good amount of time on those proposals and then you send it out and hear crickets. You might as well print it out of your own printer and put it in your own rubbish bin.

You start to think to yourself, do you call? Do you write? Do you send flowers? What about a text message? It's sometimes quite difficult to know whether they've read your proposal and chances are you get busy and then you don't even follow it up and so you leave money on the table. In this practical webinar, you're going to discover how to appear confident and professional when you ask if your prospective client wants to proceed. I'm going to also teach you how to sense how much to follow up without overstepping the mark, have a strategy that teaches your clients and when you will follow up. Then also going to discover how to gracefully reach out to past clients and encourage them to return. And everybody also probably knows it's easier to get a past client to spend money with you than it is to go out and find new clients, and so it makes a lot of sense to take care of that well of opportunity that's already ahead of you.

Right, let's get into it. Here we go. We're not going to be pushy, we're just going to be respectful with our clients. What is follow up and why don't we always do it? Well, you want to make sure you've got a clear outcome from a proposal or offer and the follow up is where if they don't come back to you in a proactive fashion, then you will go to your prospective client and you will find out what their intentions are. Now, often we don't do it because you don't want to bother the client. We fear rejections. We're pretty hardwired to try to avoid rejection. In ancient times if we got banished from the tribe, we'd break an ankle or a wild animal would eat us if we got left behind, even in medieval times, if you got thrown outside the village wall, bandits might come or do something to you.

That rejection is pretty well baked into us even though we theoretically know that nothing really bad will happen to us. We fear judgment because we think that they're going to think that we're just needy and greedy, and also we just get busy. If we don't feel like going to those uncomfortable places, it's very easy to occupy ourselves with all sorts of other busy work. Now the reason you should follow up is because you don't want to leave money on the table. You've already done all of that effort in finding out what they need, finding out if you can help them, finding at how you can help them, making a recommendation, this is how we should do it together. By not finding out if they want to go ahead or not, you probably have had the experience one time at least where you've reached out to a path client. They've said, "I'm so glad you called, I've meant to give you a call, but I got caught up in something else. I'm so glad you called, but let's book a date in to get started."

And this is not only great for your cashflow, but it's also a reward for your work around that initial conversation. There's a deep down that you've got to have that recognition, your client can sometimes put off making a decision. Sometimes they would prefer to avoid thinking about should I spend the money now or later? Because they're also avoiding the uncomfortable situation, they let themselves get busy. Susannah, let's kick off with a poll. How much does the audience follow up on a proposal or offer? S somebody should have checked the grammar on that one. Let's say that it's how much do you follow up on a proposal or offer? No, it's right. How much follow up do you do?

CCH Learning:

Thank you, Abbie. Is it A, none, I've put the offer out, they need to revert. B, sometimes once if I really need the work. C, always once, it's just good practice. D, sometimes twice if they really seemed keen, or E, too much. Sometimes my clients tell me that I call too often. I'm going to launch the poll and please put a click in the radio button next to the answer that best describes your situation. Just a reminder, if you do have any questions, please put them into the questions pane and we will get to those questions at the end of the presentation.

Dr. Abbie Widin:

It'll be interesting.

CCH Learning:

It's great to see everybody voting, so I'll just give you about 10 more seconds to get your votes in.

Dr. Abbie Widin:

What happened? There we go. Susannah, what I'm reading here is 10% of the people have said none. I put the offer out, they need to revert. 60% say always once it's just good practice and 30% say sometimes twice if they seem really keen. Right, well, I think there's some great opportunities here. No more of this leaving money on the table. It's not the right economic climate to be doing things like that. There's absolutely no nobility in poverty. Let's pick up some of this loose change. What types of conversations need following up? We definitely, if you've got a formal written proposal for client work, that is going on the to-do list. Quick emails offering help for a client, that's also going somehow be tracked. Adhering to a service level agreement, particularly if you've got a monthly retainer or something like that.

You don't want the other side just to start lapsing in their obligations because as soon as they stop responding to doing the work that they need to be doing, then pretty soon your monthly retainer is going to seem awfully expensive. You may have some offers to speak at a lunch and learn. You may even create some offers to speak at a lunch and learn. Offers to collaborate with a peer or business partner. Sometimes you might have a loose or a tight marketing arrangement where you might have somebody in parallel but not overlapping, complementary but not overlapping services. You might say, "Well, let's market to each other's clients." Definitely we need to be following up on outstanding invoices. If you're part of the Wolters Kluwer Netflix for Professionals, you'll probably see the ... I think we've got a webinar called Late Invoices, How to Follow Up with Grace and Ease, which is a very, very fine webinar.

When we think about how we sabotage our offers, so every now and then you might start ... Sorry, you might find that you're not getting the right amount of conversions that you want. It starts with the belief that I'm not good at this. And this could be for sales, it could be for follow up, it could be for new client engagements, could just be feeling a little bit less extroverted and more introverted. I'm not good at dealing with people and not good at dealing with clients. You start up to the belief that I'm not good at this and so therefore you think, well, no one's going to buy this. You feel a bit hopeless and frustrated. Your behaviour then is you don't bother to prepare very well and then you put off having conversations around it, you then start to stumble through your conversations because you haven't practiced and rehearsed it enough.

The behaviour then comes out, you don't actually make an offer which then ruins your chances of selling. If you do manage to fumble something out, you get a, "No thanks," all of which just goes to confirm your belief that I'm not good at this. On the other hand, there is a flip side of this and I quite like how this high performance can become self-fulfilling. If you start with the belief that, "I'm going to be successful at this," you start to think to yourself, "Somebody is actually going to buy what I've got to offer." You feel optimistic and confident, which means you plan and practice and rehearse, which between you and me is going to build up your competence. The more you practice, the better you're going to get at it. Then the beautiful confidence, competence, virtuous cycle, you get more competent, you become more confident.

Then you plan your time and you listen for opportunities. If you know you've got a half hour conversation with a client or a 15 minute one, you know at minute seven or minute 12, you need to be saying, "Well, let me pause you there and ask you a question about something." This means you're going to excel at your conversation. You're going to make a compelling offer, which means you're going to optimize your chance of selling, which means you're going to receive a yes please, which confirms your belief that you're going to be successful at this. Now I don't know exactly where you are on your journey. I'm very, very pleased to hear at this webinar today, I don't know whether you're a seasoned professional who's just looking to sharpen the saw or whether you're a

brand new green behind the ears novice who's just hung out their own shingle and really needs to make some stuff happen.

But regardless of where you are in your journey and regardless of the size of the firm you're in, even if you hear some of the information here and you think, "I've heard that before," try to think about what you're going to implement over the next day or the next week. There's always something that you can become a little more intentional about or bit more deliberate about. And I'd encourage you to find your one, two, possibly three things that you're going to put into practice in the very near term, practice and rehearse it and then try it out. Let's think about how you feel when you have to call to arrange a meeting with a new prospect. You might feel a bit nervous or apprehensive. You might actually have the call scheduled with a new prospect. You think, "I've got to call them at 10:00. It's 9:58, 9:59."

How do you feel when you know it's coming up? Do you feel prepared? Do you feel confident that you know how to walk somebody through it? When you start having that initial conversation meeting with a new prospective client, sometimes if you're very good at it, you'll feel quite excited, filled with anticipation, possibly even curiosity. "I wonder what's going to happen. This person may end up being a valuable relationship over the long term." And how do you feel when you have to follow up? You've sent out that proposal, you haven't heard back. Does it make you feel heavier or does it make you feel lighter? If it makes you feel heavier, it's probably because you haven't done one or two of the things ahead of time that we're going to try to put in place today. When you follow up, you should be feeling as if this is something they actually want you to do.

All right, so part of following up, it's all part of this selling process. I didn't put it right in the very beginning in the introduction to the webinar, but reality is if you follow up well and they say yes, they're going to give you some money because you've sold something. Why don't we like selling? Some of our professionals with our white collars are not comfortable in the role of shopkeeper. It feels a bit transactional and not pure. We've talked about the rejection, which is an ancient fear. We fear judgment, about being perceived as needy or greedy or heaven forbid, a loser. We fear failure. Avoiding pain is they say 17 times more motivating than achieving pleasure. We try to avoid risk more than we do achieving our aspirational goals. We make up stories about the person on the other receiving end.

They won't have time to look at this proposal because they're not interested. They're not going to change who they're working with. Why would they change and why would they come to me? They think that I messed up the conversation, I stuttered a couple of times or ummed and ahed my way through it, but it's a far better belief to remember that sales is service. At the end of the day people wouldn't have called your telephone, sent an email through to your email address or gone along to a networking event if they didn't ... Or received a referral from somebody, if they weren't interested. Almost always people are talking to you because they know that they've got a problem that they want solved. If you get to the point of discovering what that problem is and then actually saying, "I think I can help you," that's going to help you a lot in remembering people are trying to solve the problems that they've got.

Proposals or offers to work together, this is the first thing that we are going to follow up on. These can be formal or informal and generally come at the end of an initial conversation. I won't get through this in huge depth because again, in the Netflix for Professionals, there's an excellent webinar called From Initial Conversation to Profitable Client where we go through how to do the greetings, where you want to establish expertise, authority, and trust. You want to discover what the client is trying to achieve, what pain are they trying to avoid? What's their problem? And most importantly, why is it urgent that they do it now? Yeah, why not wait another six months or a year to get done what they've got to get done? You might share a compelling narrative.

This is where you say, "I had a client just in this situation," really best if you don't make it up, if you've actually got a genuine story like this, but you share how you've helped others and this gives you social proof in a time where you don't actually have a third party sitting right there beside you and then you give a way forward. "The way that I can help in this particular situation is by doing X, Y, and Z." Then you have to offer, you say, "Would you like me to help you with that?" Then the person says yes or no. Imagine yourself as a prospect. Before you talk ... And when I say prospect, I mean, like a prospective client. Before you talk to this new service provider, who is you, what are you worried about? What are you scared of?

What are you hopeful about? And what do you need to hear? What do you need to hear to feel confident that this person can help you? And you've got these slides as a handout. This is a really useful exercise. The more corporate you get in your clients, the less that this is important because you've got your buying criteria, you've got metrics, you've got to be able to put this person in front of your management team. They've got to have a certain amount of credibility and authority, way to bring them in the room. But for a small business or a family owned business or even a consumer, the emotions are hugely important, possibly more important than the logic of why you decide to go with one provider over another.

Now if you take these questions, if you sit down and you write them out and you say, "What are you worried about?" You're probably worried about your service provider's judgment. What do you mean you keep all your receipts in a shoebox? What kind of nong-nong are you? But you wouldn't actually say that out loud, but they're worried that you think that, or you've got some litigation and the lawyer's going to look at you and say, "How did you get into this? What were you thinking? You signed this contract? I wish you'd come to me." The other person feels like a bit of a duffer. But the bit about what you need to hear to feel confident is very important. If you sit down and just jot a few notes, you'll find your next conversation goes very well. Now are you worried about being called too often? If this doesn't even come up on your radar, it's something that could be a problem. Are you worried that they won't follow up on you?

Well, sometimes if people don't follow up, they think that you don't care. The mindset that you should have before talking with the prospective client is just to remember it's not about me. It's not about the fact that I need this job or the fact that I don't have enough clients or I'm just starting out or whatever it is. It's not about you at all. Get that out of your head. It's about you helping them to get the result that they want. You need to understand what's going on with this prospect. You need to communicate how you can help. Imagine if you went into a restaurant and they didn't say, "Would you like a menu?" Or, "Would you like coffee after you finish your dinner?" If appropriate, you need to ask when they want to work together. Now you also need to be willing to reach out and find out what they decided to do.

Now once they've left the room, you've got no ability to stay in touch other than you reaching out or them reaching out, and be the one to do it first if you have to. And don't worry about closing. How do I get them to yes? Just make sure you make a definite offer. Oh, here we go. I spoiled the punchline. It should be as clear as the waiter in the restaurant. "Would you like a coffee to have with your dessert?" If the waiter didn't offer, you'd think it was a bit odd. Just make an offer. Here's the type of thing ... Sorry, and the reason I'm dwelling on this, this is less about how to follow up and it's more about what's happening during your actual conversation. And that's because if you're not getting an answer after you've sent the proposal, chances are it's because something went wrong in the conversation.

I'm seeing if we can set it up in the conversation in such a way that it becomes a fait accompli that they're either going to respond to you very quickly or if you follow up that they're expecting to hear from you. When we think about how we are going to make that offer at the end you might say, "Given what you've told me about needing a new provider and it's because of this reason, this reason and this reason, it sounds as if this particular piece of work that I think we should do together would be useful. Now I've suggested we start with the mid-tier bookkeeping package to start with. Start there. We do it for three months and then we can see if it needs to be

changed up or down after that, depending on what your circumstances are." The offer is, would you like to go ahead or when would you like to get started?

Now again, if you're speaking to Qantas or you're trying to get a deal with Woolworths, chances are it's going to take more than the first meeting. You're not selling an airplane which might take seven years. This is a professional service. It shouldn't take two months, shouldn't take three months. It take a month. You might have to do two or three meetings, a qualification meeting to say that you are who you say you are. You might give a draft proposal, you might give a proposal to the management team. You might have to come back in and say, "Here's based on the feedback you gave me, here's the changes I made to how we would go about doing this." But you would still at the end of that, you'd say, "Would you like to go ahead?" I've always got to ask that question because otherwise you leave the room thinking, "Gosh, that was a nice meeting. Didn't we all get along nicely and they put those lovely biscuits out."

That's not what you want to be here thinking. You want to know, do you want to go ahead or not? Then once you say that, you just shut up. This is the type of place where it's okay to let the silence hang and you really should learn to be comfortable with this because the other person, you are now giving them space to make that decision. If you jump in and fill the void too quickly, there's no pressure on them to make a decision and they will back away and stay with the status quo. They'll stay not making a yes decision. They'll just stay where they are stuck in the muck. When you say, "Would you like to go ahead?" You just be quiet. You have to let the other person be the first person to talk.

Even if it starts to get a bit uncomfortable, just sit there, smile a little bit, encouraging, but don't be the first one to talk. They may be thinking, "Gosh, that's a bit more than I thought, a bit more involved than I thought, but I can pay for it because I'm going to get the cash in from here. This thing is going to happen, that thing is going to happen and then we are going to be good to go." Or, "I'm going to have that person starting in that new role and so two months later I could do it here." If they say yes, be ready with the next steps. There's an old maxim that buyers buy on emotion and follow through based on logic. You want to secure a formal agreement quickly. In that case you really should know what comes next.

You might say, "Great, in that case we should get started" or, "We should plan out the next steps. I'm really looking forward to taking care of this for you." Isn't that a comforting sentence? I'll take care of that for you. All of a sudden the other person feels like you are now in a partnership. We're working together to get stuff done. I'll send through a checklist of what we need. For example, let's say you're an accountant to be invited into your accounting software or ERP or whatever, the receipts in the shoebox. We'll also need to get your past notice of assessments and group tax returns. Then you schedule the next meeting now, even if you have to reschedule it later, because once it's in the calendar you'll be able to tell really quickly whether the other person really meant yes if they also agree to put it in the calendar.

If they hum and haw and say, "Oh, I'll have to get back to you on a date," that's okay, and for some reason you might not want to schedule it, you might need to get your own business partner involved or wait until somebody else is back. You might say, "If you can send back confirmation by next Friday, I'd appreciate it. If I haven't heard back from you, I hope you don't mind if I reach out again." And you can see that I hope you don't mind is partly permission. It assumes that you're going to be given permission and it also sets the expectation that now that we are a partnership, of course it's going to make sense that we stay in touch.

Now if they say, "No, I don't want you," you've made your offer, "Would you like to go ahead?" And they say no, you should find out why not. You've just invested a good amount of time. You've shared your operating framework. You may or may not have spent time writing up the proposal or think about it, but more importantly, even if it's a no here, you ought to continuously improve. You ought to know what went wrong or what you need to do differently. And also the reason that somebody said no may not be the real reason. It may not be lost yet. You may still be able to turn this around. Always be curious.

"I hear you say that this isn't for you just now, what makes you say that?" Or you might say, "So, it's just not a priority. Okay, I can see that. But would you mind if I ask you about this? Because before I heard you say this was super important for you and it would make a big difference to have it fixed now. And now when we're talking it sounds like it's not quite as important. Where are you really at on this? It sounds like you would find it valuable." Again, you're not being pushy, you're just pointing out that there's an inconsistency in their story and it would be useful. Make sure that they're not backing out of it just because they're a little fearful or not quite certain. They might say, "Well actually you know what? I did say it was important and here are the reasons why again. I'm going to get this sorted. I can't put this off for any longer. I keep trying to kick it down the road but I shouldn't do that. I should get going."

When we think about what happens at the end of these meetings, we've just done it a little bit they say yes or there no, but there's other options that happen as well, particularly as your clients get larger or more sophisticated in how they need to work. You have a conversation and you'll either get an order which is kind of like the yes or an advancement and this is a successful meeting. You may also have a continuation or a straight out rejection. Now the rejection is when they say no and a continuation is, "Oh, this all sounds very interesting, why don't we get together next week and discuss it further?" There's no other steps in there. Nothing's going to happen between now and then. That's a continuation because we're just going to continue that same conversation and not have made any progress.

And advancement is where they say, "Look, we're interested. We're not in a position to say yes right now. What I need to do is I need to check with Billy Bob over in purchasing and Sally Ann in legal and then once I've got the answers from them, then we can come back and finish our conversation." And that's an advancement because you are making an advance on the journey. Let's go into this in a little bit more depth. The continuation is there has been no specific action agreed upon by the prospect that progresses the sale. Even though everybody got on very, very well, it was very nice having a cup of tea together.

You have a great chat, but quite often you don't know what action they want from the call. "I'm looking forward to touching base again in the near future." You're like, "What is that? Does that mean you want me to call you? Or we should set up a meeting or we should just wait until the fates decide that we run into each other at the train station?" It's so unsatisfying. And that's not what we are here for. We're having these conversations because we want to grow our practice, grow our business, and we want to end up having great relationships with clients. This is a very, very unsatisfying continuation. The advance is where an event takes place either in the call or scheduled for afterwards that moves the sale forward towards a decision. For example, the prospect, this is the prospective client, agrees to have a meeting with their business partners about your proposal or to invite you on a site visit or just show you what the dashboard looks like.

When setting your meeting objectives before every meeting, you should be thinking to yourself, "What do I want out of this meeting?" It might be, "I want an invitation to issue a proposal. I want a verbal that they want to work with me." You'd never want to set the objective that we've had a nice chat and we all got along well. It's just not good enough. We need to get an outcome here. Let's check. Obviously this is not a poll, I'm not going to really check, but for your own sake to make sure that you continuously improve, I want you to go through and identify each of the sale and advance a continuation or a no sale. I'll give you a half a second and well, maybe a little bit

longer. The prospective client says to you at the end, you might say something along the lines of, "So what do you see as the next steps?"

The prospect says, "I'll create a purchase order today so we can get started." What do you think that is? Is that a sale, an advance, a continuation or a no sale? I hope you said sale. It is definitely, it is definitely, definitely a sale. That is as close to a, "Yes, here is my cash" as you can get. The next one is, "No, although we liked what you showed us, we've decided not to proceed." It's almost like we're starting with the easy ones first. This is a no sale. This is where they've said, "Great people, but you're not for us." Which is great. Because if you've got one or two people that you've got to follow up on, that's fine. You can do it. It's a bit of a pain. You set it in your Thursday every morning at 8:45, check on see where Billy Bob and Sally Ann are up to.

But if you've got 10 or 15 or heaven forbid, 20 people, 20 proposals out there and you've got to follow up on each of them, it starts to feel a bit mechanical and you don't put your heart into it and it's really ... It's tough to keep it going. You want to get to a yes or a no as quickly as you can, or at least in advance. These continuations are no good. Here we go. Here's the next one. "I like what you're offering and I really enjoyed our conversation." Is that a sale, an advance, a continuation or a no sale? Well, it's not a no sale because they haven't said no to you. It's not a sale. Because they haven't said, "Yes, I'd like to buy something." It's either an advance or a continuation. And is there anything in there that suggests it's an advance? Are we taking a step forward? No. No, we are not. This is a continuation. This is a danger sign.

"Let's meet again in a few weeks to continue this discussion." Well, not a sale, it's not a no sale, so it's either an advance or a continuation. Is there anything that suggests that something is going to between now and our next conversation that will move us closer to selling something? I can't see it. That is a continuation and that is a bad outcome. "I can't make the decision alone, but I'll arrange for you to meet my business partner or my partner next week and I'll brief him first." Not a sale, not a no sale. We don't have a clear yes or no. It's either an advance or a continuation, and there's a step in there. "I'll arrange for you to meet my partner next week and I'll brief him first." That is definitely a step forward. That counts as an advance and that's the type of thing you're looking for.

When you ask your client, "What do you see as the next steps?" Sometimes it's fine for you to say, "Here's what I see as the next steps." But depending on who you're speaking to, you might, if they say something like this, that's not a bad outcome. Particularly if they say, "I'm going to brief him first and try to get him over the line." "We'll think about it and probably call you in the next few months." Probably? Next few months? Oh, that's a continuation. We do not be wanting to have one of those. "Now if you could include those changes to the service level agreement in your proposal, I'll present it to my associates." Not a sale. Not a no sale. That is an advance because if we have a clear next step that moves you closer to a yes or a no, but to a yes.

"All I need is my CFO's okay. We'll review it against our financial criteria. If it passes, we'll go ahead." Again, that's an advance. There is a concrete next step that is going to move you closer to a yes or a no. And in that case it's probably a yes. Okay, they said they'd call, but crickets. Use proposal software. Now if you're sending out two or three proposals a year and you've known those clients for a very, very long time, your chances are you're not here on the webinar, and the other thing is you probably don't need proposal software. You might as well just give them a call and say, "You want to keep going the way we're going, Dave?" And Dave will say, "Yeah, let's just keep going the way we're going." Using proposal software gives you an online way of figuring out whether someone has even read your proposal. You might have something along the lines like DocuSign or Proposify, Panda Docs.

There's a neat little Sydney based start-up called Qwilr, Q-W-I-L-R. And each of these has got a version. There might be more of the premium or the business professional version, but each of them has got a subscription tier that allows you to see if somebody has opened the proposal, if they've read the proposal, how long they spent reading each page. Did they skip over all of the preamble and go straight to the pricing page and they were there for seven seconds and then they clicked out of it? Or did they spend a good couple of minutes on the preamble and come through? Even if they do a digital signature, and you really don't want somebody having to print out, sign something and then scan it back, fax it back. You don't want people to have to deal with paper anymore.

Just anything like that just increases the friction between you and a yes. Number one, use proposal software that allows you to see if they've opened it, if they've read it, if they've signed it, but also use a permission based follow up. What do I mean by that? At the end of every meeting, know what comes next and who is going to do what. For example, as you wrap up the meeting, "Today is Thursday, I'll call you back on Monday" and then I make sure that I understand ... No, this is going a little bit backwards. If they say, "Today's Thursday, I'll call you back on Monday," that means that I know they're going to call me on Monday. Then very simply you might say, "If I don't hear from you on the end of the day on Monday, as a courtesy, can I follow up with you with a call to you on Tuesday? Can I follow up with a call?"

They're going to say yes, 100% of the time they say yes. It really is that simple. Now we'll come to what happens if they don't answer. But you have to in there set the expectation of when you are next going to be in touch. Like I almost always, if you've got an advance, book in the next meeting before you leave the room or before you leave the virtual room, whatever it is, but before you leave that contact with your prospective client, have the next meeting booked in. If you don't, you're at the end, you've sent the proposal, you might say, "Should we get together on Tuesday and have a quick chat about it?" They said, "No, no, no, that's all right. I'll get back to you on Monday." You still say, "As a courtesy, can I follow up with a call to you on Tuesday?"

I guarantee, I've never heard somebody say no. But let's say that they don't call back on Monday. You need to make a follow up call. If you're very, very modern, you might be sending a message on Messenger or through WhatsApp. "What did you think of my proposal?" But I still believe it's better to call people. People like doing business with people still. And when they answer you say, "This is Sue from Sue's Bookkeeping. As promised, this is the courtesy phone call I said we would have when we spoke last week." Now this is really powerful because ... And then sorry, I'll finish the conversation. "Calling to see if you have any questions about the proposal." Pause, answer any questions that they have. Make the offer again, "Would you like to go ahead?" And then shut up.

Now it's the reason I love this, it's such a simple set of questions. "I'm calling as promised," shows them that you are true to your word. Now when you say you're going to follow up, you follow up, you're setting expectations. "This is the relationship we're going to have." It's super professional. Two, it demonstrates that you do care about them and what their decision is. If you didn't care, you wouldn't follow up. When they spoke to you, if you got to the stage where you were sending a proposal, they probably told you that it was important to them that this work got done. You are saying, "You said this was important to you. I care about you and I'm going to make sure that if this is important to you that we are going to get it done." It demonstrates your care factor. Now what happens if you call and you get voicemail?

Because they don't always answer. You'll leave a message unless it says, "This is voice to text," in which case you send a text message. "This is Sue from Sue's Bookkeeping. 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 and I hope you don't mind, if I don't hear from you by Thursday, I'll call you again on Friday." Again, you're setting very clear expectations. I promised I'd call, you're not available, either call me back or I'll call you again because I know this is important.

If you've put the effort in 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. It's not very polite if they don't do that. How many times do you follow up? Generally three times. Unless they've said, sometimes if they say out loud, "At the moment, I'm really busy. If I don't get back to you immediately, please chase me on this because I want to get to it." But three times in the modern world is probably enough. Most people know how to respond to a voicemail or an email. Put it in your calendar if you think that you're likely to forget. You can do things like every Tuesday and Thursday morning, 8:45 or 10:45. Sunday afternoon. I've actually found that that is executive hour.

Your very sharpest people will set aside a time, three o'clock to five o'clock on a Sunday afternoon to get themselves organized for a week. If you send them a follow up email around one o'clock, two o'clock on a Sunday and you can schedule these things, you will be at the top of their inbox when they go through it to get themselves organized. Brilliant. Put it in your calendar that that's what you're going to do. And you could do them, batch them if you can. You don't want to be doing one on Tuesday, one on Wednesday, one on Thursday. Try to batch them. I suggest a phone call and then an email and then a phone call. If they haven't responded within a short window of a week or so, so you might do this over a 10 day period or even a week period, put them in the calendar to give them a call three months later.

I'm hoping there's a nice little script here. You might say something along the lines of, "Hi Sue, I haven't been able to get a hold of you. You must be really under the pump. I'm going to take that to mean that this isn't something that you've got time to look at now. What I'll do is I'll put a calendar reminder in three months time and I'll reach out to you again and see if you want to get going with the work then." Again, people just take that as a sign that you care. They don't think, "Oh, my God, does this person have no clients? They're so needy and greedy." They don't think that at all. If you've now said, "You must be really busy, you haven't gotten back to me like we said we were going to." You don't assume anything other than positive intent. You have to assume that your client is all above board and is doing everything that they say they were doing because that's how you are. You're expecting a reciprocity in the relationship.

Now this also then brings me to, say you've got a new client, new proposal, but let's say you've got some previous clients, you've noticed that clients, they move away, they fade away, they pass away, but let's say you've got a client for whatever reason you haven't heard from in six months, nine months, and you want to know how they're getting on. Now, it can feel tricky to reach back out to past clients and particularly if you're a divorce lawyer, you probably don't want to do it too often. You might use the mindset of I still have a duty of care towards this client and maybe they've moved on to another client ... I'm sorry, another provider, but maybe they're not satisfied with them or worse, they no longer have anyone helping them. Maybe they have regrets and they want to come back.

You have a duty of care and a curiosity about how they're going. You might email them to touch base. Here's a sample script, but again, this is yours. You've got to own it, change it the way you want to change it. You might say, "Dear Sue, I was thinking of you recently and wanted to reach out and see how you are." And you might say, "Here's a trigger. I saw your industry or your company" or something in the news or on a website. There's always a trigger. "I was driving past the street and it prompted me to think of you. However did you go with" whatever it was they were last trying to get done? "Let me know if it's easy to meet up over a call and look forward to hearing." Now if they are thinking, "I wonder if I really would be better off back with my old provider," this is the beautiful no pressure invitation to get back in touch and just find out how things are going.

Now that should give you, and again, if the person doesn't answer, try two or three times, "Just wondering if you had a chance to look at this." No pressure, pure curiosity. And after three times you might say, "Oh, look, you must be super busy. I'll try you again in three months." I hope that's useful. Best of luck building your business. And don't forget, even if times look a little lean out there, it swings and roundabouts and it will at some stage look up. The more activity you put in, the better the results we'll get. Luck really does like activity and giving it a go. Thank you, Susannah. I hope that was useful.

CCH Learning:

Thank you very much for that, Abbie. I hope everybody enjoyed that. We will be spending the next few minutes taking questions, so please just a reminder to please type them into the questions pane. To give you some time to type those up, I will mention our upcoming webinars. Coming up for the rest of the week, we're looking at more in regards to FBT 2023. We're also looking at creating and sustaining goal focused teams and sustainability reporting frameworks. Next week we've got another chapter in our FBT 2023, this time meals and entertainment. We're also looking at some income tax case law update and we're also going to be discussing ATO private rulings when, why, and how. If you have any interest in any of those, please head to our website and have a look. Let's have a look about if we've got any questions. Okay, so I have a question from Jerry. Jerry is asking, it's looks like it's less about the follow up so much and more about the sales process. Have you got any resources you can recommend?

Dr. Abbie Widin:

Oh gosh, Jerry, yes. There's some great books out there and some of these people have got YouTube channels and you can often get some great insights without necessarily spending a lot of money on courses. One of my favourite is called the RAIN Sales Group and they've got quite a good guide to how you think about structuring a conversation up front in a way that feels a lot more like a consultative selling where you're asking a good amount of questions and then it feels almost inevitable that you end up working together.

There's a guy called Alan Weiss, he is a bit of a showman and so you might find a picture of him standing in front of his Bentley and in front of a wildly successful lifestyle. But he's got a very, very good book called How to Charge What You Are Worth and in that, he believes that in order to make a good income from professional services or consulting, the way that you set up your proposal is really very important and therefore the way you set up your conversation ahead of that proposal is equally important. I think it is a slightly more expensive book, but that's probably worth having in hard cover on your professional library. Look, if you find the RAIN Sales Group, R-A-I-N, and you find resources on consultative selling, I think anything in that space will serve you well.

CCH Learning:

Thank you for that, Abbie. I hope that helps you there, Jerry. I have a question from Stephanie. Stephanie was asking how do you follow up an old client, about three years, that you worked in at an old firm and would like to touch base?

Dr. Abbie Widin:

Well, three years is more than enough time. You've probably long passed any poaching clauses that existed in your old employment contract. Generally those things are non-competes for 12 months and sometimes they don't even hold up for that long. You would reach out ideally by email or on LinkedIn and say, "Hey, I was thinking of you, we used to do some great work together. Just wondering if you've got time to catch up for a brief 15 minute phone call. I'd love to let you know what's going on from my side, but also just to catch up in general."

If that past client has got any wits about them, they will know that you've probably set up shop somewhere else, you hung out your own shingle at another place and they'll be able to put two and two together, but they also just might like catching up. I would just say, "Let's catch up for 15 minutes." If you're in a town rather than those crazy big cities, you'd probably go and see if you can get time to catch up for a coffee. But yeah, no, definitely reach out and say, "I was thinking of you." You might put a trigger in you. "I just read a thing in the newspaper that made me think of you and I just had to reach out and see how you were. Have you got time to catch up briefly?" Yeah, definitely do it. Don't feel any qualms about that at all.

CCH Learning:

Thanks for that, Abbie. I hope that does help you there, Stephanie. I have a sort of similar question here as well from James. James was just asking, he says he's got some proposals from last year. Should he still follow those up?

Dr. Abbie Widin:

What are we in? 14th of March? Absolutely. We are not at home to the Mr. Leaving Money On The Table. You might reach out to them by email first up and say, "Dear Sue, just realized that" ... Sorry. "Just going back through my old paperwork and I realized in the mad rush to the end of last year, we never closed out this proposal. Did you end up finding someone else to work with or is this something that you'd still like to take a look at?" Sue will probably either say, "Thank you very much and we're right." On the other hand, Sue may say, "Oh, I've been looking for that proposal and I haven't been able to find it. And James, I'm so glad you've gotten back in touch." I can't tell you which way it's going to go, but absolutely, even if it was from about August/July, if it was truly 12 months ago, I would at some stage, the half life of these things becomes a bit hard. But anything from July/August onwards in particularly if it's from September/October onwards, yeah, fair game, bring it on.

CCH Learning:

Thank you for that, Abbie, and I hope that helps you out there, James. Well, that does bring us to the end of our questions for today. In terms of next steps, I would just like to remind everyone to please take a moment to provide your feedback when exiting. We have asked you a couple of questions about today's webinar, so it's really important for us to hear your opinions. It's also a reminder that within 24 to 48 hours you will be enrolled into the e-learning recording, which can be watched multiple times and have access to the PowerPoint, transcript, any other supporting documentation, and of course a CPD certificate. I would very much like to thank Abbie for the session today and to you, our audience for joining us. We do hope to see you back online for another CCH Learning webinar very soon. Please enjoy the rest of your day. Thank you very much.

Dr. Abbie Widin:

Thank you. Have a good week. Bye.