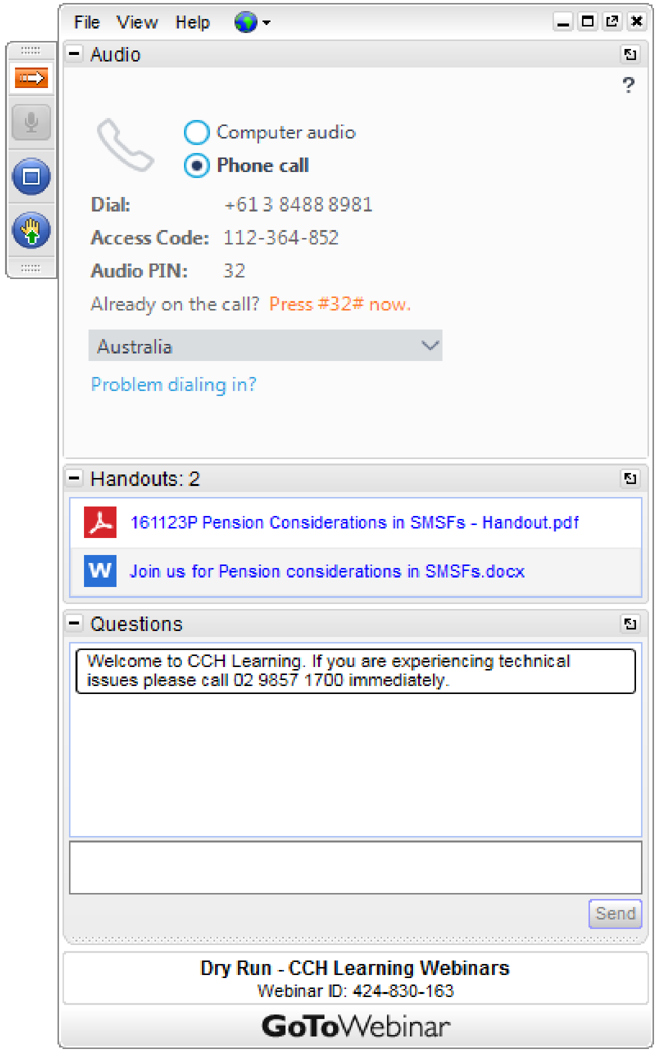
How to Follow Up Gracefully

Dr Abbie Widin

Tuesday 14 March

How to participate today

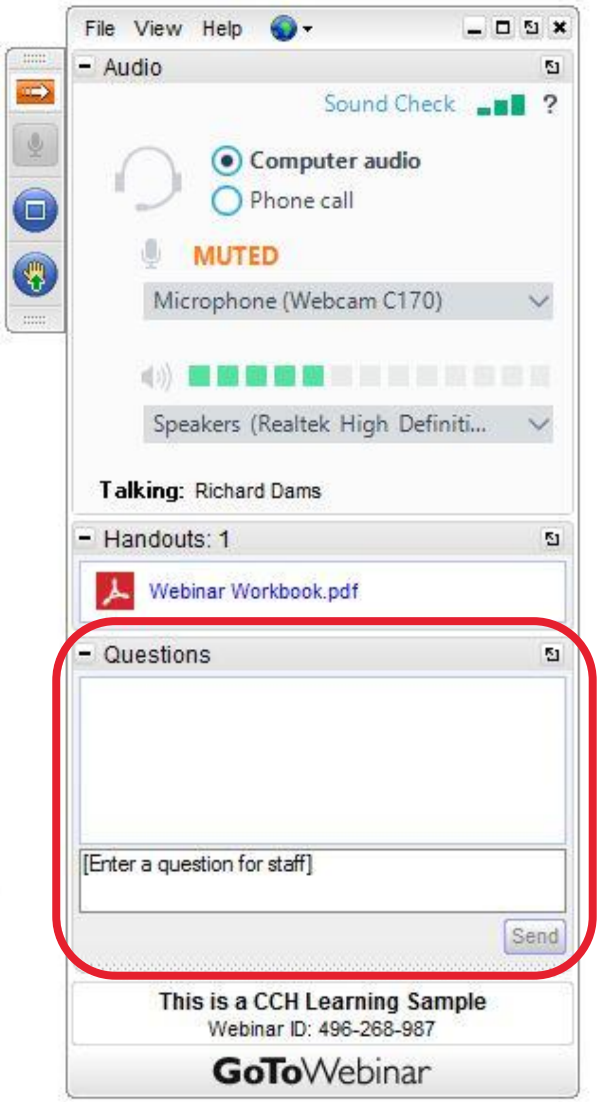


- Handouts Section - PowerPoint
- Sound Problems? Toggle between Audio and Phone
- Within 24-48 hours you will receive an email notification of the e-learning Recording

Questions?

Susannah Gynther
Moderator

Type your question and hit 'Send'



GROW YOUR SKILLS, GROW YOUR KNOWLEDGE, GROW YOUR BUSINESS.

Subscribe to CCH Learning and gain **unlimited access** to all live webinars, E-Learnings and supporting documentation.

Plus, your CPD hours will be recorded automatically.

au-cchlearning@wolterskluwer.com

Your Presenter

Dr Abbie Widin
Consultant
Go To Market Company

This session will cover:

How To Follow Up Gracefully

How to follow up on new client proposals & encourage past clients' possible return:

- You've heard the phrase 'the fortune is in the follow-up', but how do you follow-up on proposals without coming across as irritating or painful, or even worse, desperate?
- There is nothing worse than having an initial client meeting, spending time writing up and sending a proposal, and then… nothing.
- Do you call? Write? Send a text? How do you know if they have even read it? Chances are, you get busy with other things and let it slide, and leave money on the table.
- In this practical webinar, you will discover how to:
  - Appear confident and professional when you ask if your prospective client wants to proceed
  - Sense how much to follow up, without over-stepping the mark
  - Have a strategy that teaches your clients how and when you will follow up
  - Gracefully reach out to past clients and encourage them to return
- There are no pushy techniques here, just respectful approaches that build trust in your capacity to serve them.

What is follow up, and why don't we always do it?

- Making sure that you have a clear outcome from a proposal or offer

- Often fails to get done because:

  - Don't want to bother the client
  - Fear rejection
  - Fear judgement
  - Get busy

Why should we follow up

- Don’t leave money on the table
- Rewarded for your work around the initial conversation
- Understand that the client can put off making a decision, and can get busy too

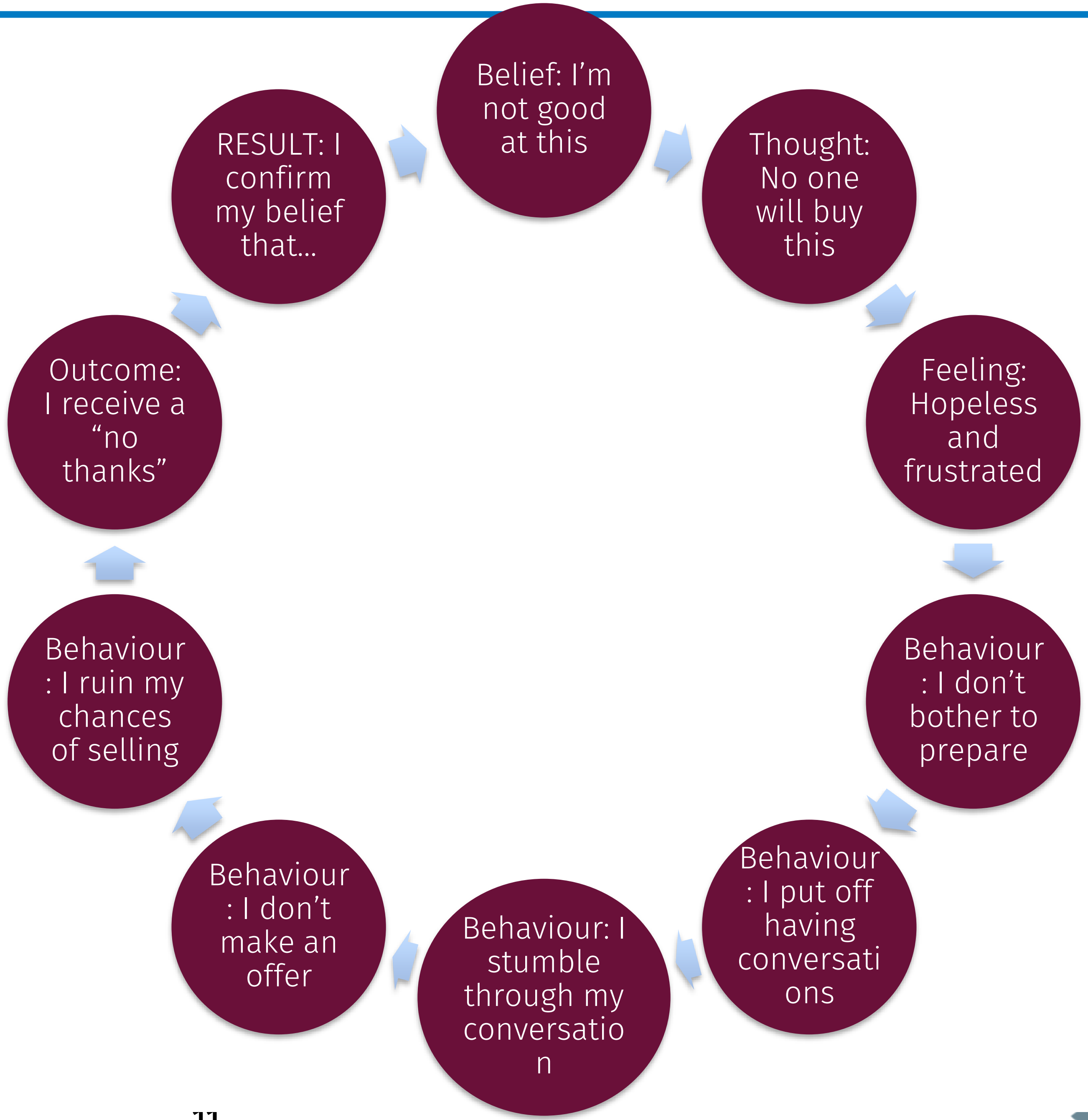
POLL: How much follow up do you do on a proposal or offer?

- 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
- e) Too much! Sometimes my clients tell me that I call too often

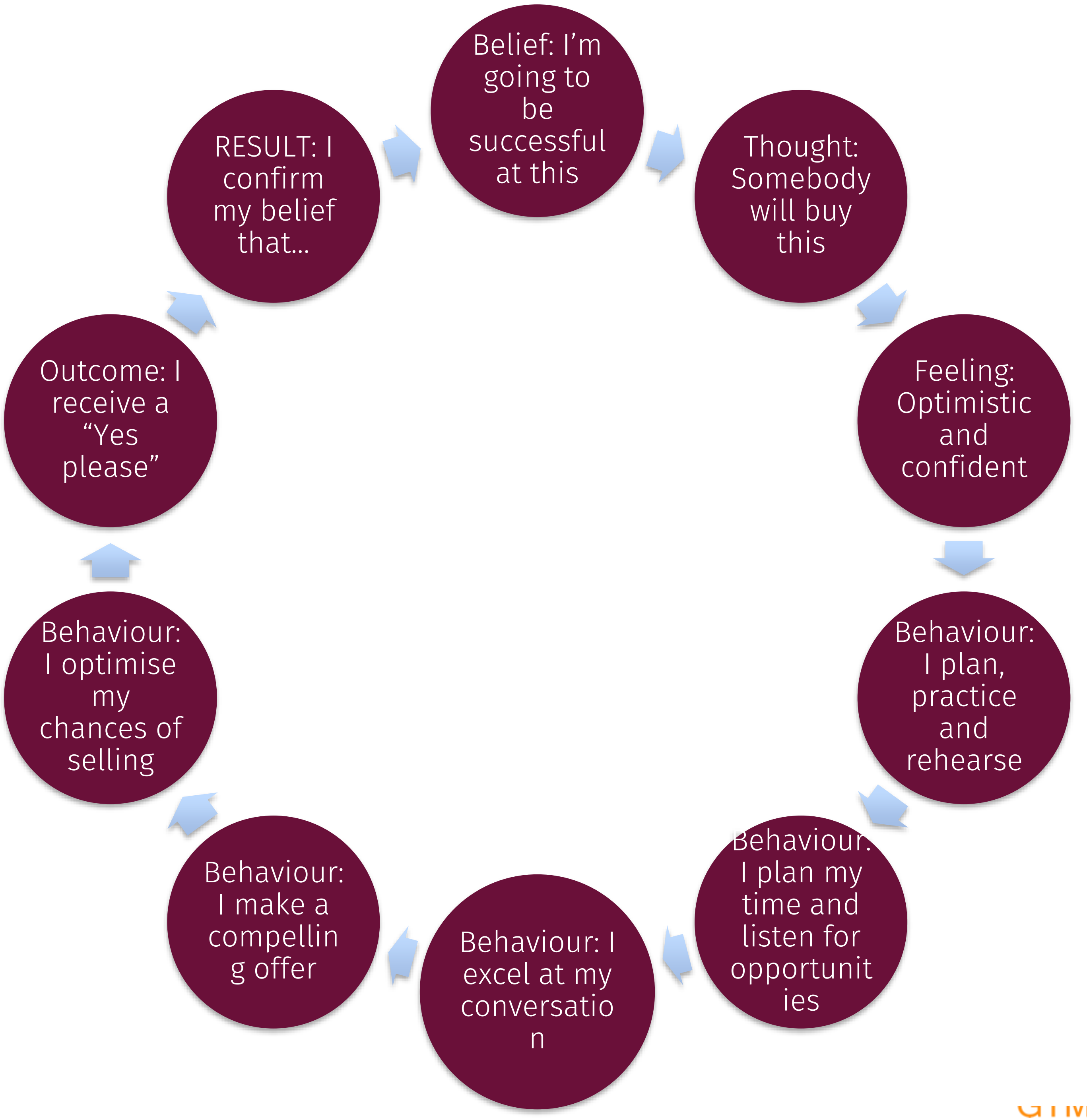
What types of conversations need following up?

- Formal written proposals for client work
- Quick emails offering help for a client
- Adhering to a Service Level Agreement
- Offers to speak at a lunch n learn
- Offers to collaborate with a peer or business partner
- Outstanding invoices!

How we sabotage our offers



How high performance becomes self-fulfilling?



How do you feel?

- When you when you have to call to arrange a meeting with a new prospect?
- When you have a call scheduled with a new prospect?
- When you have an initial conversation meeting with a new prospective client?
- When you have to follow up?

Why Don’t We Like Selling?

- We’re not comfortable in the role of “Shop Keeper”
- We fear rejection – ancient
- We fear judgement: We care about being perceived as needy / greedy / a loser
- We fear failure: avoiding pain is far more motivating than achieving pleasure
- And so we make up stories

Stories about your prospect

- They won’t have time to look at this proposal
- They’re not interested
- They’re not going to change their provider
- They think I messed up the conversation

Useful beliefs

Sales is Service

- At the end of the day, people wouldn't be talking to you if they weren't interested

Proposals or Offers to work together

- These can be formal or informal
- Generally come at the end of an initial conversation

Flow of an Initial Conversation

1. Greetings – establish expertise, authority and trust
2. Discovery – what is the client trying to achieve, what pain are they trying to avoid, and why is it urgent to achieve it now
3. Compelling narrative – share how you have helped others
4. Way forward – explain how you can help
5. Offer – offer to help (THIS STEP IS CRITICAL!)

Imagine Yourself As The Prospect

Before you talk to this new Service Provider:

- What are you worried about?
- What are you scared of?
- What are you hopeful about?
- What do you need to hear to feel confident?
- Are you worried about being called too often?
- Are you worried that they won’t follow up you?

Mindset Before Talking With a Prospective Client

- It's not about me, it's about helping them get the result they want
- I need to understand what's going on this prospect
- I need to communicate how I can help
- If appropriate, I need to ask when they want to work together.
- I also need to be willing to reach out and find out what they decided to do

Don’t worry about closing…

- Just make sure you make a definite offer
- It should be as clear as the waiter in the restaurant:
  - *“Would you like a coffee to have with your dessert?”*

Just make an Offer

- *Given what you've told me about needing a new provider [and all of the reasons you've mentioned], it sounds as if this would be useful for you. I've suggested that we start with the mid-tier bookkeeping package to start with, and we can see if it needs to be changed up or down.*
- *Would you like to go ahead?*
- OR *When you like to get started?*

- And shut up!

Be ready with next steps – yes!

- There's an old maxim that buyers buy on emotion, and follow through based on logic. You want to secure formal agreement quickly.

- If yes, know what comes next, eg:
  - *"Great, in that case, we should get started. I'm really looking forward to taking care of this for you. I'll send through a checklist of what we'll need, for example, to be invited into your [accounting software / ERP / shoebox]."*
  - *We'll also need your past Notice of Assessments and group tax returns.*

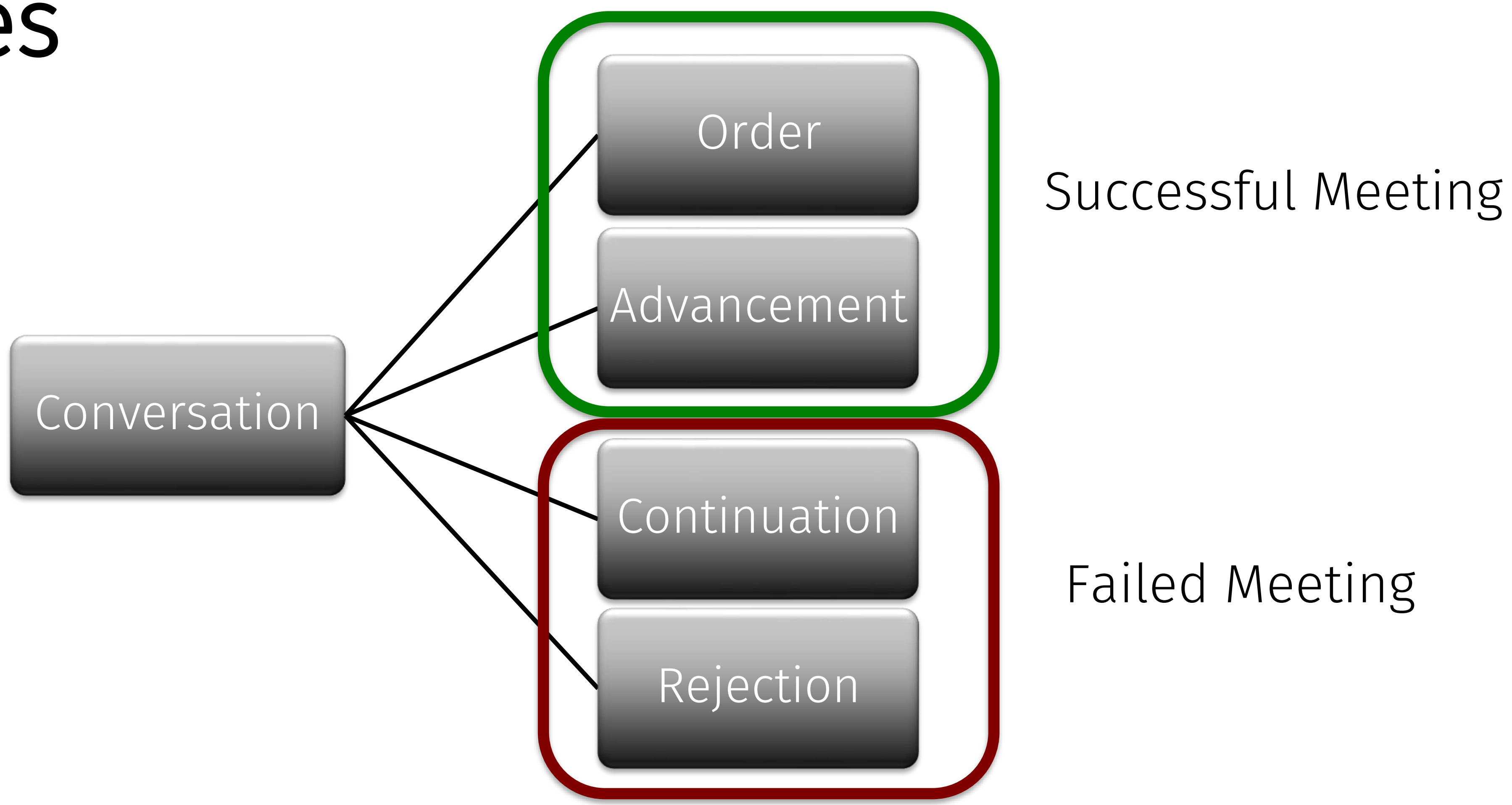
- Schedule the next meeting now, even if you have to reschedule later. If you really don't want to schedule a meeting, at least set the expectation:
- *"If you can send back confirmation by next Friday, I'd appreciate it. If I haven't heard back from you, I hope you don't mind if I reach out again."*

If no, you should find out why not

- You've just invested a good amount of time, and shared your operating framework;
- And you want to continuously improve;
- And also, it may not be lost yet…

- *"Oh, I hear you say this isn't for you just now. What makes you say that?"*
- *"So, it's not a priority just now. Would you mind if I ask you about this? Before, I heard you say that this was super important for you, and it would make a big difference to you to have this fixed. And now it sounds like it's not quite as important. Where are you really at on this? It sounds like you would find it valuable."*

Meeting Possibilities



Advances vs. Continuation

- Continuation: there has been no specific action agreed upon by the prospect that progresses the sale, although all parties got on quite well
- It's been a good chat – quite often, you don't know what action they want from the call.
  - Eg, the call finishes with "Yes, it has been great to speak with you, and I'm looking forward to touching base again in the near future."

- Advance is where an event takes place, either in the call or scheduled for afterward, that moves the sale forward toward a decision
  - Eg, prospect agrees to have a meeting with their business partners about your proposal

- When setting your meeting objectives, it's OK to be dissatisfied with objectives that only result in a Continuation

Let's Check

Identify each as Sale, Advance, Continuation or No-Sale

- I'll create a purchase order today so we can get started.
- No, although we like what you showed us, we've decided not to proceed.
- I like what you're offering, and I really enjoyed our conversation.
- Let's meet again in a few weeks to continue this discussion.
- I can't make the decision alone, but I'll arrange for you to meet my partner next week, and I'll brief him first.
- We'll think about it, and probably call you in the next few months.
- If you could include those changes to the SLA in your proposal, I'll present it to my associates.
- All I need is my CFO's OK. We'll review it against our financial criteria, and if it passes, then we'll go ahead.

They said they'd call, but crickets…

- Use proposal software
- Use permission-based follow up

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?”*
- One hundred percent of the time they say yes. It’s that simple.

When you need to make a follow up call

- 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.

If you get 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 many times to follow up?

- Generally three times, unless they have told me that they get busy and to keep trying
- Put it in your calendar!
- I suggest a phone call, email and then phone call
- If they haven’t responded within a short window of a week or so, then I would put them on the calendar to call again in three months

How to follow up with a previous client

- It can feel tricky to reach out to past clients
- Use a mindset of "I still have a duty of care to this client, maybe they are not satisfied with their current provider, or worse, no longer have any provider…"

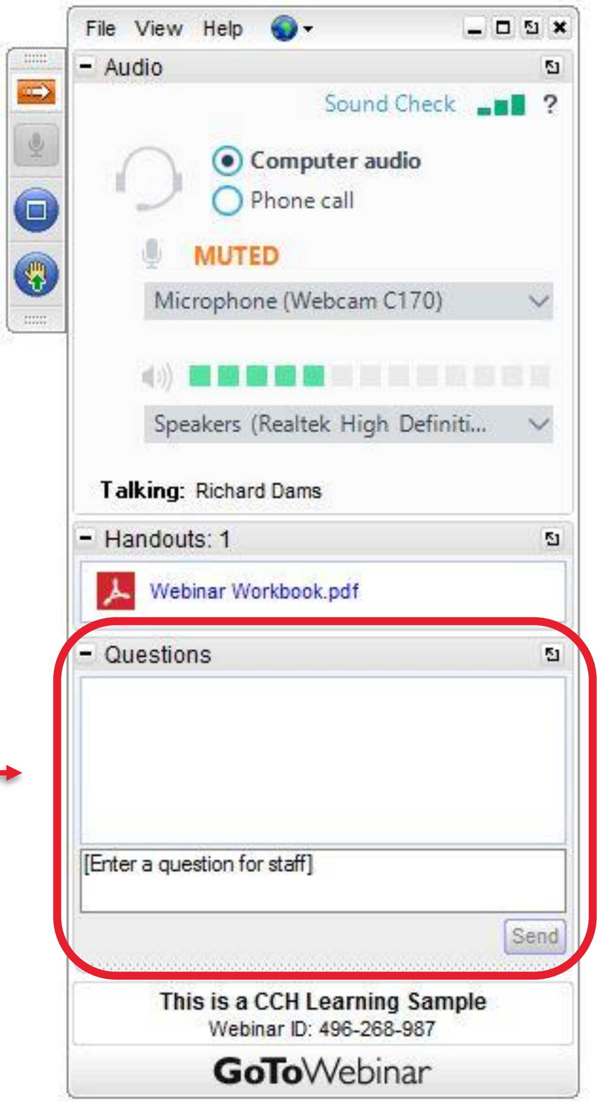
Email them to touch base

- Try this:
- *"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."*

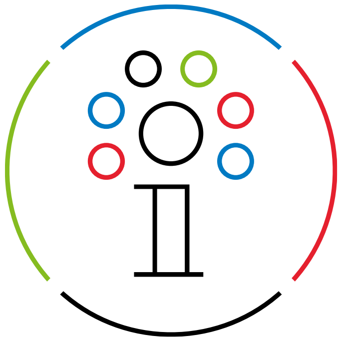
Questions?

Susannah Gynther,
Moderator

Type your question and hit 'Send'



Upcoming Webinars



- 15 March - FBT 2023 - Relocations, LAFHA, Remote & Travel
- 16 March - Creating and Sustaining Goal Focussed Teams
- 16 March - Sustainability Reporting Frameworks
- 22 March - FBT 2023 - Meals & Entertainment
- 23 March - Income Tax Case Law Update
- 28 March – ATO Private Rulings – When, Why & How?

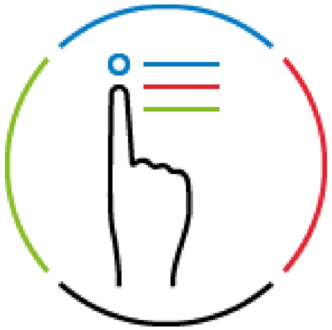
Questions

Dr Abbie Widin
Consultant
Go To Market Company
0407 210 693
abbie@gtmco.com.au

Next steps

Please complete the Feedback Survey when the webinar ends

Within 24-48 hours you will be enrolled into the E-Learning which includes:



- a PDF of the PowerPoint
- a verbatim Transcript
- any supporting documentation
- a CPD Certificate

Thank you for attending

Wolters Kluwer

GTM Co