

## The Sales Follow-Up Sequence

### When to Implement:

After a sales call has been completed with a prospect.

### Who is Included:

Any prospect who was a fit for your product or service, but did not move forward. We don't recommend including prospects who flat out said 'No.' But this is for the group that is 'Maybe' or 'check back in with me' or 'Let me think about it' or 'Send me some details after the call.' You know the type. :-)

### Set-up Process:

1. Create a Tag that will organize the contacts intended for this sequence.

The screenshot displays the 'TAGS' management page in the CONNECT 365 application. At the top, there is a navigation bar with 'CONNECT 365' and menu items: DASHBOARD, CAMPAIGNS, CONTACTS, TAGS (highlighted), MAIL ACCOUNTS, and SETTINGS. A 'Leave Feedback' button is also visible. Below the navigation bar, there is a search bar labeled 'Search Tag' and a dropdown menu for 'TAG NAME'. A red arrow points to an orange 'Create Tag' button. Below this, it shows 'Total Tags: 13' and a 'Show 10 Records' dropdown. The main content is a table with the following data:

TAG	TOTAL CONTACTS	TOTAL CAMPAIGNS	DATE	ACTIONS
SEQUENTIAL CAMPAIGN - 1	51	1	May 18, 2018	[Edit] [Delete]
TAG - CART CLOSE	1995	0	Feb 21, 2018	[Edit] [Delete]
TAG - PROFILE ASSESSMENT ROUND 6	87	0	Feb 10, 2018	[Edit] [Delete]
TAG - PROFILE ASSESSMENT PEEPS - ROUND 5 P1	376	0	Feb 9, 2018	[Edit] [Delete]
TAG - PROFILE ASSESSMENT PEEPS - ROUND 4	569	0	Feb 9, 2018	[Edit] [Delete]

2. This will be a Sequential Campaign and our example has 4 follow-up messages that will be sent out.

The screenshot shows a campaign management interface. At the top, it says "Good Fit for LU...But Said No" with a "High Priority" toggle switch and a "SEQUENTIAL CAMPAIGN" label. Below this is a navigation bar with "MESSAGES", "RECIPIENTS", "ADVANCED ACTIONS", and "SETTINGS". The main area contains a table of messages:

STEP	SUBJECT	STATUS	MESSAGE TIMING	CONDITION	ACTIONS
4	Haven't heard from you in a while, {firstname}	SCHEDULED	5 Minutes Later	-	[Edit] [Delete]
3	Re: Can I hold your spot for this?	SCHEDULED	1 Days 8 Hours 9 Minutes Later	-	[Edit] [Delete]
2	Can I hold your spot for this?	SCHEDULED	2 Days 2 Hours 14 Minutes Later	-	[Edit] [Delete]
1	Follow-up from our conversation today	SCHEDULED	May 29, 2018, 3:59:00 PM	-	[Edit] [Delete]

3. Create Message 1.

The screenshot shows a message creation editor. At the top, there is a "Delay" section with dropdown menus for "Days" (0), "Hours" (0), and "Minutes" (10). Below this is a rich text editor with various formatting options (bold, italic, underline, link, etc.). The message content is as follows:

Hi {firstname},

Just wanted to say thanks again for spending time with me talking about your business and letting me share a bit about what we do.

I also wanted to share with you this short one-pager with more information on Linked U.

Let me know if you have any questions and I'll jump in wherever needed.

Thanks,

Josh

## 4. Create message 2 scheduled to go out a few days after your first follow-up

Delay

2 Days 2 Hours 14 Minutes

Send this message unless

Select Condition

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Rich text editor toolbar: Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Undo, Redo, Font Color, Background Color, Text Color, Replacement Text

{firstname},

The price for Linked U is going to be shooting back up to over \$1500 in the next couple of days.

I can still get your seat locked in at the workshop offer of \$897 or 3 payments of \$397 if you're still interested in using LinkedIn to generate more leads with the high-level clients you are going after.

Let me know if I can answer any questions for you, or feel free to book a time on my calendar [here](#) to discuss.

Thanks,

- Set a condition to “Send this Message Unless A Reply Is Received”

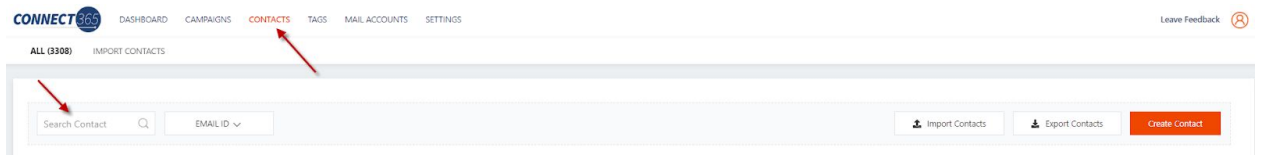
Send this message unless

A reply is received

\*\* If you are sharing a booking link or a sales page link - create a Zap through Zapier to ‘Remove a Contact’s Tag if they purchased or Booked a Call’.

This will eliminate them from further follow-up.

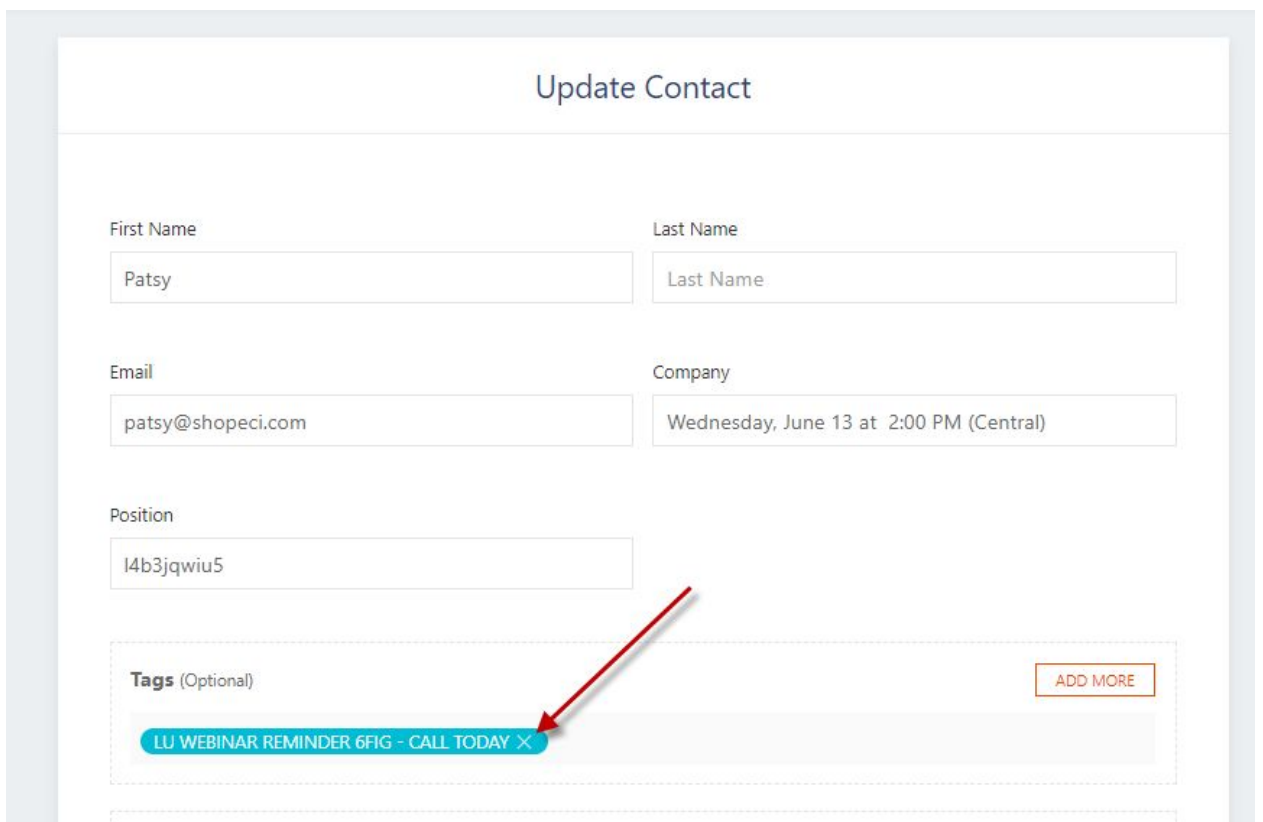
**Note:** You can also manually remove a tag from a contact by searching for that contact within Connect 365



Choosing to Edit that Contact.



And clicking the 'X' next to the tag that organizes them into your campaign.



5. Add Message 3 to go out a few days later.
  - Follow the conditions from the prior step to remove contacts who

reply, book a call, or purchase your product/service.

- Set Message 3 to Send as a Reply (in same thread).

UPDATE MESSAGE

Subject

Re: Can I hold your spot for this? +

Send this message as a Reply (in same thread).

Delay

1 Days 8 Hours 9 Minutes

Send this message unless

A reply is received ▼

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↶ **B** *I* U  $x_2$   $x^2$

Replacement Text ▼

Hey {firstname},

Last call before the price of Linked U will be doubling this week.

Be sure to reply [here](#) if you're still interested in knocking over 40 percent off the price.

Or if you have any unanswered questions, book spot on my calendar here.

Talk soon,

Josh

Josh Turner

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6. Add Message 4 to go out a 10-14 days later.

- Follow the conditions from the prior steps to remove contacts who reply, book a call, or purchase your product/service.

## UPDATE MESSAGE

Subject

Haven't heard from you in a while, {firstname}



Send this message as a Reply (in same thread).

Delay

12 Days 0 Hours 5 Minutes

Send this message unless

A reply is received



Hi {firstname},

Just wanted to drop you a quick note since I haven't heard back from you in a while. So, this tells me one of 3 things:

1. You are all set with your lead gen/prospecting efforts and strategies. If this is the case, please let me know and I will stop bothering you.
2. You are interested, but just haven't had the time to respond.
3. You are being chased by a hippo.

Please let me know which one it is. :-)

As I would also like to respect your time, and eliminate too much back and forth, if you'd like to speak about this further feel free to book a time on my calendar using this link:

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CANCEL

SAVE

## Example Layout of a Sales Follow-up Campaign

SUBJ	TOPIC	TIME DELAY
Follow-up from our conversation today	send over details of the offer	
Can I hold your spot for this?	The workshop offer is going away any questions I can answer?	~ 2 days later
Re: Can I hold your spot for this?	Link to faq video and last call	~ 1-2 days later
Haven't heard from you in a while	"break-up" email	~ 12 days later