HOW TO EFFECTIVELY FOLLOW UP WITH YOUR CLIENTS

& HOW PRINT MARKETING CAN HELP YOU DO IT!

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"It is not your clients' job to remember you. It is your obligation and responsibility to make sure they don't have the chance to forget you."

—PATRICIA FRIPP

Contents

Introduction

You've worked hard to get your clients. You don't want to lose them to someone else simply because they forgot about you.

That doesn't just hurt your feelings. It hurts your checkbook. Consider these facts:

6-7 TIMES

Acquiring new clients can cost six to seven times more than retaining existing clients.
SOURCE: WHITE HOUSE OFFICE OF CONSUMER AFFAIRS

60–70%

The probability of selling to an existing client is 60-70% compared to just 5-20% for a new prospect.
SOURCE: MARKETING METRICS

2% = 10%

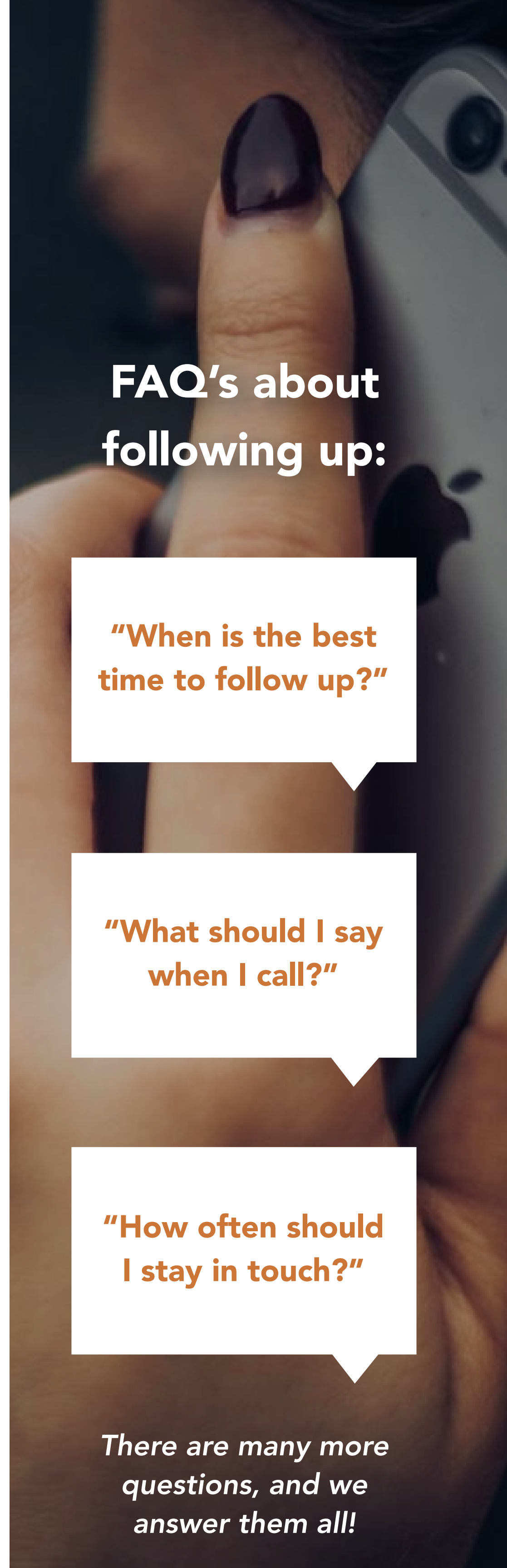
A 2% increase in client retention has the same effect as decreasing costs by 10%.
SOURCE: LEADING ON THE EDGE OF CHAOS, EMMET MURPHY & MARK MURPHY

NURTURE

Nurtured leads spend 47% more on purchases than non-nurtured leads.
SOURCE: ANNUITAS GROUP

Following up with clients is the best way to keep your business on their minds and put yourself in the presence of opportunity for referrals and repeat business. It sounds pretty simple, but actually doing it is another story.

While most clients appreciate an authentic attempt to build an ongoing relationship, they can sense when you're reluctant, insincere, or nervous. And they'll respond accordingly.



FAQ's about following up:

"When is the best time to follow up?"

"What should I say when I call?"

"How often should I stay in touch?"

There are many more questions, and we answer them all!

We created this success guide to help answer some of the common questions asked about how to properly follow up with clients. While there is no magic bullet that can guarantee success, we recommend sending your clients something of value that can help break the ice and keep you top-of-mind. It's why we publish American Lifestyle and Start Healthy magazines. Using one of these magazines, along with the tools, tactics, and advice in this guide can help you hone your follow-up skills and techniques.

Developing Your Follow-Up Strategy

Your busy schedule leaves little time to think about and reach out to everyone you've done business with. Yet building relationships requires that you make each person feel valued. That's why having a strategy is so important.

The three main ingredients of a successful follow-up strategy are the audience, the timing, and the message. Let's explore each.

ESSENTIALS TO A SUCCESSFUL FOLLOW-UP:

- **AUDIENCE** *Who to Follow Up With*
- **TIMING** *When to Follow Up*
- **MESSAGE** *How to Follow Up*

AUDIENCE

Who to Follow Up With

After looking at the statistics at the beginning of this guide, you probably want to immediately get in touch with every client in your database. But that isn't realistic for most of us. There are only so many hours in a day, after all. And even if you could follow up with everyone in one day, it would not be the ideal approach.

The goal is to build one-to-one relationships that make each client feel special. That's why your follow-up strategy should begin with identifying and prioritizing the best follow-up opportunities within your client base. Here are a few strategies to help you do just that.

1

PLAN FOR TARGETED OPPORTUNITIES.

There are times when an opportunity to contact a client will present itself. Birthdays are an obvious example. The less apparent occasions are the ones that will really make an impression and help you stand out.

For instance, if you know that your client is a vegetarian, sharing a meatless recipe provides a natural opening.

The only way to identify and remember these personal details is to listen to your clients and make notes. Here's a handy resource to help you do just that.

FOLLOW-UP Booklet

DOWNLOAD THIS FREE FOLLOW-UP BOOKLET!

2

PUT YOUR BEST CLIENTS FIRST.

If there is no obvious excuse to reach out, then prioritize your contact list. We suggest starting with your best clients. They hold the greatest potential for referrals and repeat business. Next, move on to the rest of your client base and then your sphere of influence.

The same strategies you use when planning your direct mail or email marketing are appropriate for your follow-up call plan as well. In fact, coordinating these efforts is a great way to stay organized and maximize the potential impact of your efforts.

3

IMMEDIATELY FOLLOW UP WITH EVERY NEW CLIENT.

There may not be a better time to reach out than after a business transaction. You're fresh on your client's mind, and he or she is likely feeling good. Following up gives you the opportunity to turn those feelings into referrals and shows that you value their relationship beyond the transaction.

Call to find out how he or she is doing. Make sure they are still satisfied with the service you provided. And don't forget to make sure you have their contact information so you can market to them in the future via mail or email.

TIMING

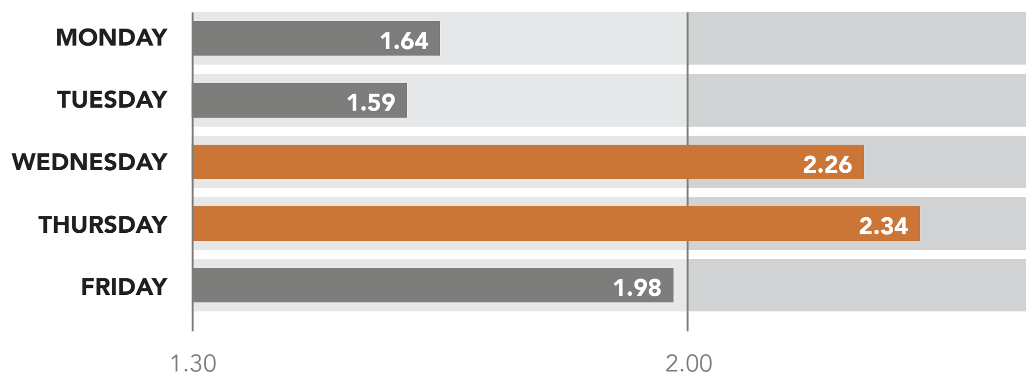
When to Follow Up

Timing can be everything. If your clients are busy or distracted, you'll have a hard time getting your message across. You also don't want to spend all your time trying to get through to clients who are unavailable. So scheduling your activities is an important aspect of your follow-up strategy.

Insidesales.com studied three years of data across six companies in an effort to determine which time of the day and day of the week to follow up with web-generated leads for ideal contact and qualification rates.

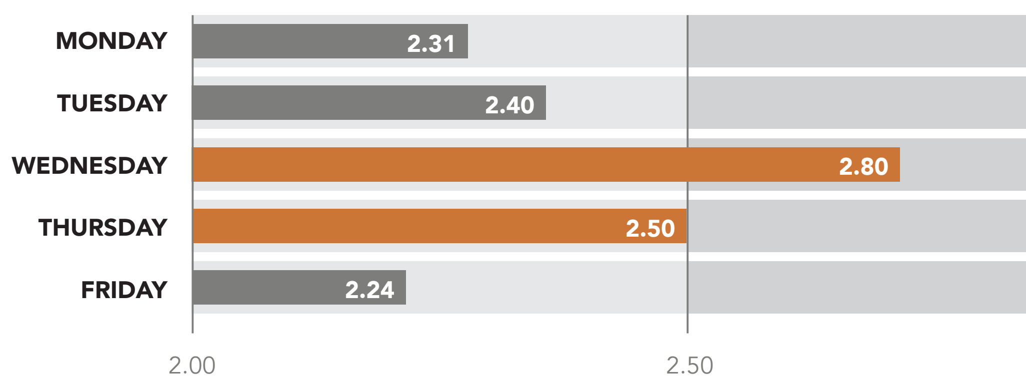
DAY OF THE WEEK: INITIAL CALLS TO LEADS THAT RESULT IN CONTACT

Wednesdays and Thursdays were found to be the best days to call to make contact. In fact, sales representatives had **47.8% more success** contacting leads on Thursday than the worst day, Tuesday.



DAY OF THE WEEK: INITIAL CALLS TO LEADS THAT BECOME QUALIFIED

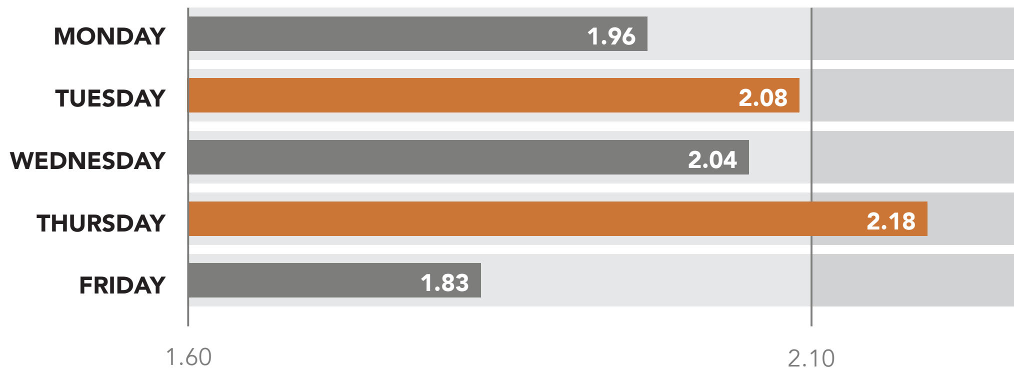
Wednesdays and Thursdays were also the best days to call to qualify leads. There was a **24.9% difference** between the top day, Wednesday, and the worst day, Friday.



NOTE: While these results are a good place to start, they won't necessarily be your best times. Do a little experimenting for yourself to see what works with your clients. Be sure to document the times and days that work best for each client so you can continually optimize your approach.

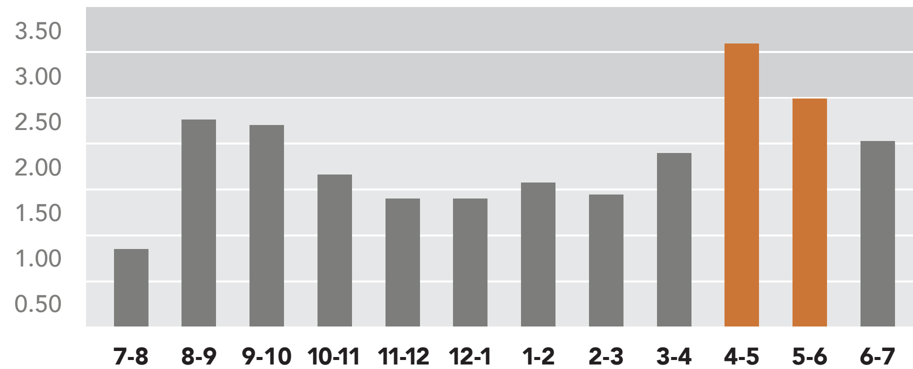
DAY OF THE WEEK: CONTACT LEADS THAT BECOME QUALIFIED

When looking to qualify a lead, calling on Thursdays produced **19.1% better results** than Fridays, which is the worst day.



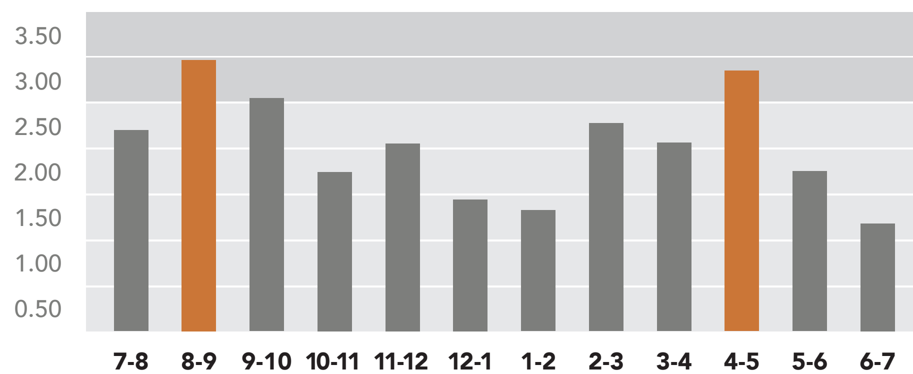
TIME OF THE DAY: INITIAL CALLS TO LEADS THAT RESULT IN CONTACT

4 p.m. to 6 p.m. proved to be the ideal hours to call to make contact with a lead. They produced contact rates **114% better** than calls made from 11 a.m. to 12 p.m., right before lunch.



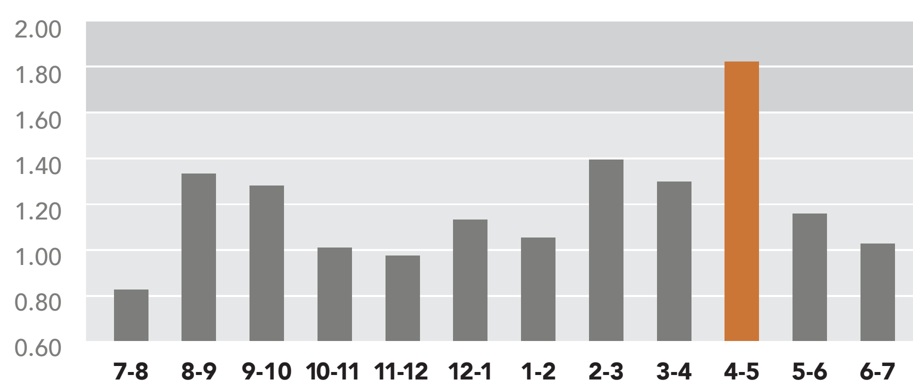
TIME OF THE DAY: INITIAL CALLS TO LEADS THAT BECOME QUALIFIED

The best times to call to qualify a lead were 8 a.m. to 9 a.m. and 4 p.m. to 5 p.m. There was a **164% difference** in success rates between 8 a.m. to 9 a.m. and 1 p.m. to 2 p.m., right after lunch.



TIME OF THE DAY: CONTACTED LEADS THAT BECOME QUALIFIED

For calls that actually connected with leads, 4 p.m. to 5 p.m. is the best time to qualify that lead. According to the results, it was **109% better** than 11 a.m. to 12 p.m., which was the worst time.



TIMING

Follow Up Via Email

For email follow-ups, you might want to test 8 a.m. to 10 a.m. and between 3 p.m. and 4 p.m. According to research from GetResponse.com, sending emails during these peak engagement hours can increase average open and click through rates by 6%.

Scheduling follow-ups into your workflow will make the process easier. Set aside time dedicated to following up. It doesn't have to be overwhelming. Break it up into small chunks to make it manageable.

The most important thing to do is make sure to stick with it. Relationships aren't built on a single contact, but on consistent engagement. Maintaining regular contact is key to building positive rapport.

80%

OF SALES REQUIRE

5-12

FOLLOW-UP CALLS

SOURCE: THE MARKETING DONUT

MESSAGE

How to Follow Up

In many ways, follow-ups can be a juggling act. Relationships are based on trust. That requires a fair degree of altruism. If you only call looking for new business or asking clients for something in return to your offering, they'll be skeptical of you.

On the other hand, you don't want to pass up opportunities to generate referrals or repeat business. Yet it happens more often than you'd think. Dale Carnegie said that 91% of clients say they'd give referrals, but only 11% of sales people ask for them.

A good follow-up call walks the line by focusing first on strengthening the relationship and building trust. Once you've established trust, then you can ask for referrals.

ANATOMY OF A GOOD FOLLOW-UP CALL:

While each follow-up is unique, and there is no single best way to approach it, this four-step formula is highly effective:

STEP 1 *Break the Ice*

STEP 2 *Make a Personal Connection*

STEP 3 *Provide Value*

STEP 4 *Use a Call to Action*

STEP 1

Break the Ice

Often, starting a conversation is the hardest part of the entire follow-up call. It's made a lot easier if you can chat about something you have in common. We recommend giving your clients something of value that you can both talk about. This is precisely why we publish American Lifestyle and Start Healthy magazines—they help break the ice in a way unique to print marketing. **Check out all the examples below to help get you started!**

"Did you read the travel feature in my latest magazine issue yet? It instantly took me down memory lane to my favorite vacation spot, where I will be going this summer. Do you have any trips planned?"

"I know school is starting back up again soon, are the kids looking forward to going back? What was the highlight of their summer?

"I love connecting with all of my clients. How do you like this issue of your magazine?"

"Have you read that article about traveling cross-country on the Lincoln Highway? I know you were brainstorming your first post-retirement trip, and I thought the article would be great for you."

"I wanted to congratulate you again on your new home! How is everything working out with the new place so far? Have you done any projects yet?

"I wanted to give you a quick call to let you know that every time I send you my magazine, I remember how fun it was working with you. Enjoy this issue, and remember that I'm grateful to be your real estate agent."

"I know you are vegetarian, did you enjoy the vegetarian recipe I sent you in the magazine last week?"

"I know it's been a few years since we last connected, but you should have received my magazine recently, and I wanted to see if you had a chance to read it. I ask because it has an article about the Marathon Man in it, which of course made me think of you! Do you still compete in triathlons?"

STEP 2

Make a Personal Connection

This step is essential for building rapport. You want to demonstrate that you value the client you're talking to as a person. This is another area where keeping notes can really help. Use personal information you glean from them to lower their guard, establish common ground, and set yourself apart.

Connecting on a personal level is easier than you may think. Here's a short list of examples to get you started:

Ask about his or her family by name.

"How are Jane and the kids?"

"Is Johnny going into kindergarten this year?"

"What's new with the twins?"

Reference something from a previous conversation.

"How was your trip to California?"

"What color did you end up choosing for Ethan's bedroom makeover?"

Leverage their interests.

"I remember how much you like Indian food, so I wanted to make sure you saw the Indian slow cooker recipes in the latest edition of the magazine you received."

"Did you catch the game last night? I think they're going to the World Series!"

TIP: When in doubt, use the FORD method of conversation and ask about their: **Family, Occupation, Recreation, and Dreams.**

STEP 3

Provide Value

The best way to get someone to do something for you (such as give referrals) is to first give something to them. It doesn't have to be physical. Information and advice can be just as effective as long as it's relevant. Examples of this could be: sending them an American Lifestyle or Start Healthy magazine to their home, emailing them informative and entertaining digital marketing such as links to local events or even a digital magazine, or giving them an update on the latest housing market trends (if you are a real estate agent, for example).

Use the scripts below as a starting point to bring up the item of value you are planning to send them.

"I gathered some local events that I think you and your family would really enjoy, may I email that over to you?"

"Did you enjoy the magazine I sent you? I would love to keep sending it to you if you would like!"

STEP 4

Use a Call to Action

After you've successfully completed the prior steps, you've likely established enough rapport to ask for referrals. It can be as simple as asking the following question:

"By the way, do you know anyone who is in the market for ______________________?"

As you can see from the examples on the preceding pages, you can often combine more than one of these steps in a single statement.

No matter what you decide to say during your calls, the action of following up with your clients will speak volumes, strengthen your relationships, and result in more repeat business and referrals.

Conclusion

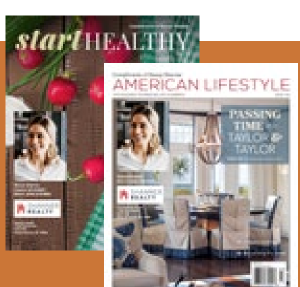
As you've seen, following up with clients doesn't have to be complicated, time-consuming, or nerve-racking. All it takes is a little commitment and organization to be a follow-up rock star.

And the best part is that you should see a significant impact on your business. Tip: Don't forget to follow up on content you share on social media and email as well!

In fact, simply following up is probably the number one thing you can do to immediately increase the return on your investment if you are sending American Lifestyle or Start Healthy magazine.

What are the benefits of sending your own personalized magazine?

1. **They provide an easy way to break the ice when you call your clients.**
2. **Since you can put your contact information on the front and back covers and two tear out cards, it makes it easy for your clients to contact YOU.**
3. **Within a year, 58% of readers have referred the professional who sent them the magazine.**



Interested in sending your own magazine to help with your follow up strategy?

Click here or visit remindermedia.com/followuptool for more info!