



Follow-Up: Best Practices

General Practices

- **Don't be 'salesy'** – People love to buy but hate to feel 'sold to'.
- **Write professionally** – Use proper grammar, punctuation, spelling, etc. Anything that is off detracts & distracts from your message.
- **Show personal interest** – Even in an automated email, phrases such as "Hope you & your family are well" make it feel personal.
- **Identify what you do & all you do** – People get a LOT of emails. They can easily forget what our company offers. Many clients contact us for one service but may be interested in more once they know what we offer.
- **Keep it brief** – People ignore or unsubscribe from long emails.
- **No Banners** – Even automated follow-up emails should feel personal.
- **BE YOU** – There is no 'one right way' to follow up. Let your personality shine through. This will always be unique to your company and will endear your clients to your business.

Visit for Bid Sequence

1. **Request for Quote** – Standard email to explain your 'in-person' quote process.
2. **2-3 Days** – Brief email to explain that the quote is taking longer than normal.

Open Sequence

- **Include the proposal link in EVERY message** – The goal is to make it as easy to spend money with your company as possible.
- **Be Helpful** – Offer to answer any questions they may have about your company or services.
- **Include a Call to Action** – Let them know what you want them to do (ex. schedule their service). You can add urgency by letting them know that you book up quickly. (Caution: Be careful not to come across as pushy.)
- **Highlight WHY Your Company is the Right Choice** – You can include things that are unique to your business, reference your great reviews, and even quote your clients feedback on their experiences.
- **Get the Team Involved** – Some emails can come from the owner, some from the office manager, etc. This gives the client the feeling that they are part of the family.
- **Use admin emails to trigger a personal follow-up** – A helpful phone call 'just to make sure they received the pricing menu' and to see whether they have any questions or want to schedule their service can increase your close rate.
- **Vary your approach** – Not every phone call has to be made manually. An automated Voicemail Bomb several days into the sequence designed to 'check in to see whether they have any questions' will also work. Text messages can also reach some who don't use email regularly.

Closed Sequence

- **Head off bad reviews and invite great ones** – Use an email that goes out a couple of days after the service to ask whether there was anything you could have done better so you can fix it. If everything went well, include a link and invite them to share their experience with their neighbors.
- **List all your services** – Your clients may not realize all that your company offers, or they may have forgotten what you do.
- **Include an online quote/service request form** – The goal is to make it as easy as possible for your clients to purchase your services. For example, in Jotform you can create a form in about 5 minutes that will collect the name, street address, phone number, email address, notes, and allow you to create a checkbox list of all of your services.
- **Set up emails at regular intervals** – Popular intervals are 3 month, 6 month, 1 year, 2 year, etc. Use what works for you. For example, if you offer pressure washing or roof cleaning, growth may not return for 2 years or longer. However, your client may need a roof cleaning this year and a house wash next year.
- **Be creative** – Integrate admin emails, text messages, SendJim postcards, & Voicemail Bombs. Additional Closed sequences allow you to send different messages to long term clients over the course of time.