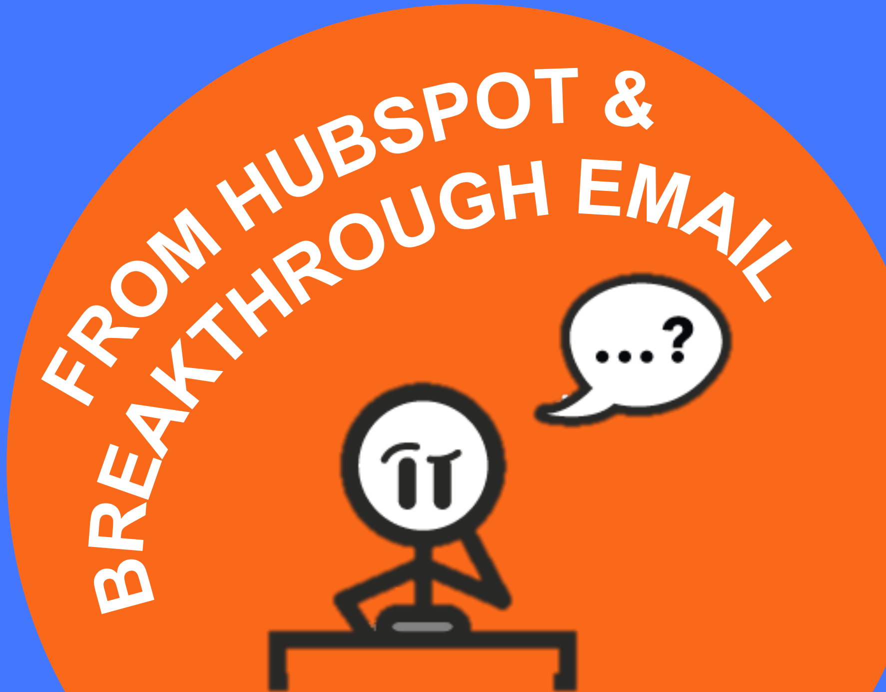
How To Follow Up:

PROVEN STRATEGIES & EMAIL TEMPLATES



Brought to you by:

Michael Pici

HubSpot CRM

Bryan Kreuzberger

Breakthrough Email

Our Agenda

1. Follow up mistakes…even top salespeople make
2. How to follow up … when you get a trigger event
3. How to follow up…after a meeting

1.

Follow up mistakes...
even top salespeople make

FROM HUBSPOT & BREAKTHROUGH EMAIL

Have you ever walked out of a meeting where ...

The client is hanging on your *every* word.

They were *finishing* your sentences.

They didn't *flinch* at the price.

Have you ever walked out of a meeting where ...

The client is hanging on your *every* word.

They were *finishing* your sentences.

They didn't *flinch* at the price.

You're already deciding how you'll spend the commission check.

Fast forward three months …

They *aren't* returning your calls.

They're *not* responding to your emails.

You feel like you're reaching out to an *empty* void.

Fast forward three months ...

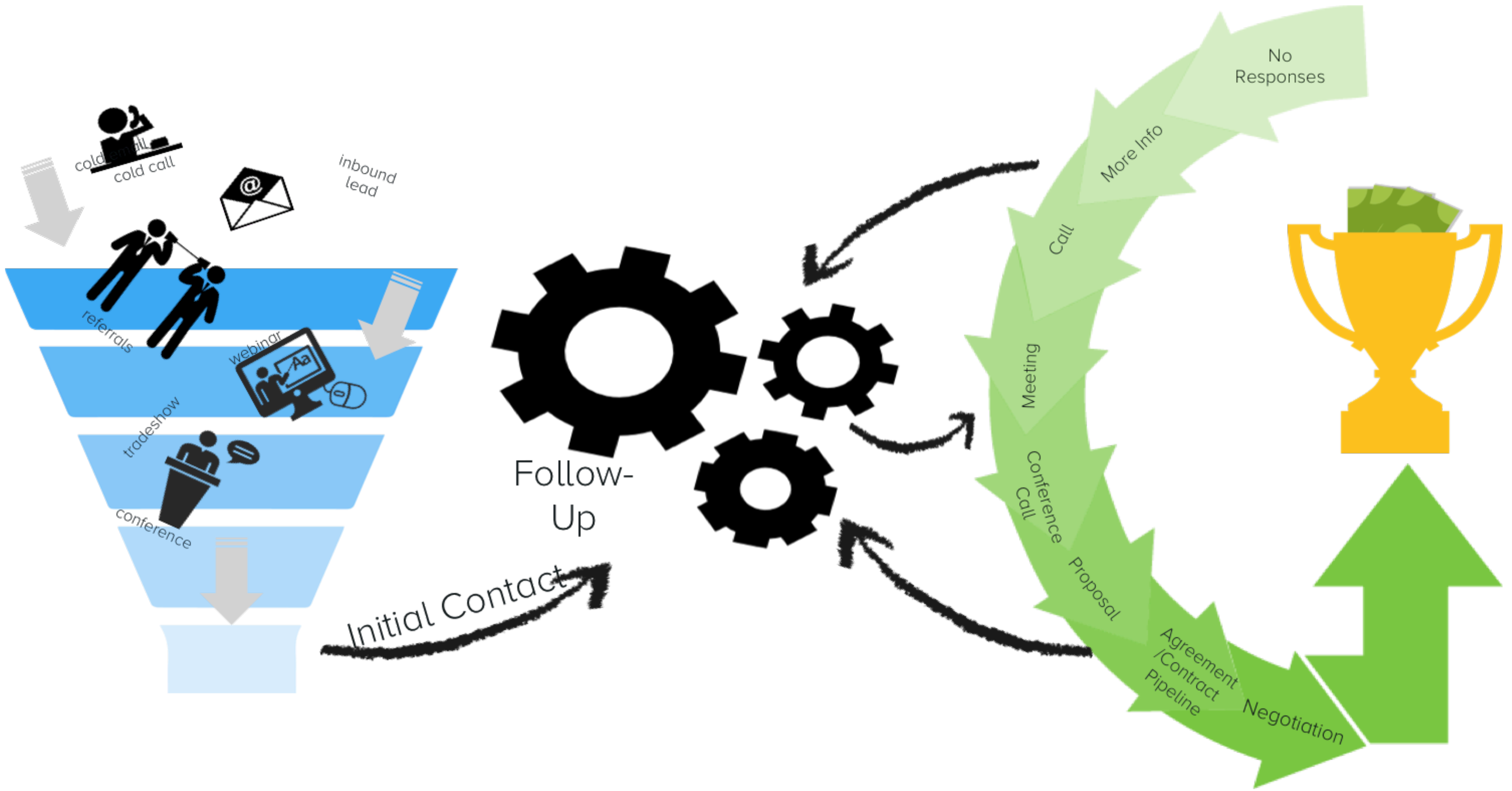
They *aren't* returning your calls.

They're *not* responding to your emails.

You feel like you're reaching out to an *empty* void.

That's because we made the biggest mistake when following up – we didn't end the call scheduling our next conversation.

There are many different types of follow ups.



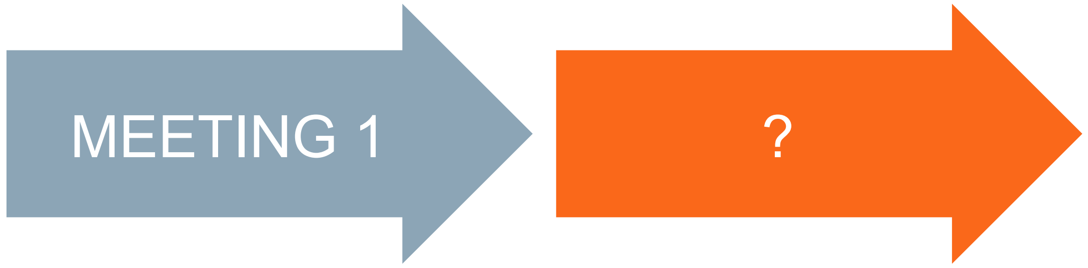
There are multiple steps leading to a purchase.

There are multiple steps leading to a purchase.

MEETING 1

FROM HUBSPOT & BREAKTHROUGH EMAIL

There are multiple steps leading to a purchase.



There are multiple steps leading to a purchase.

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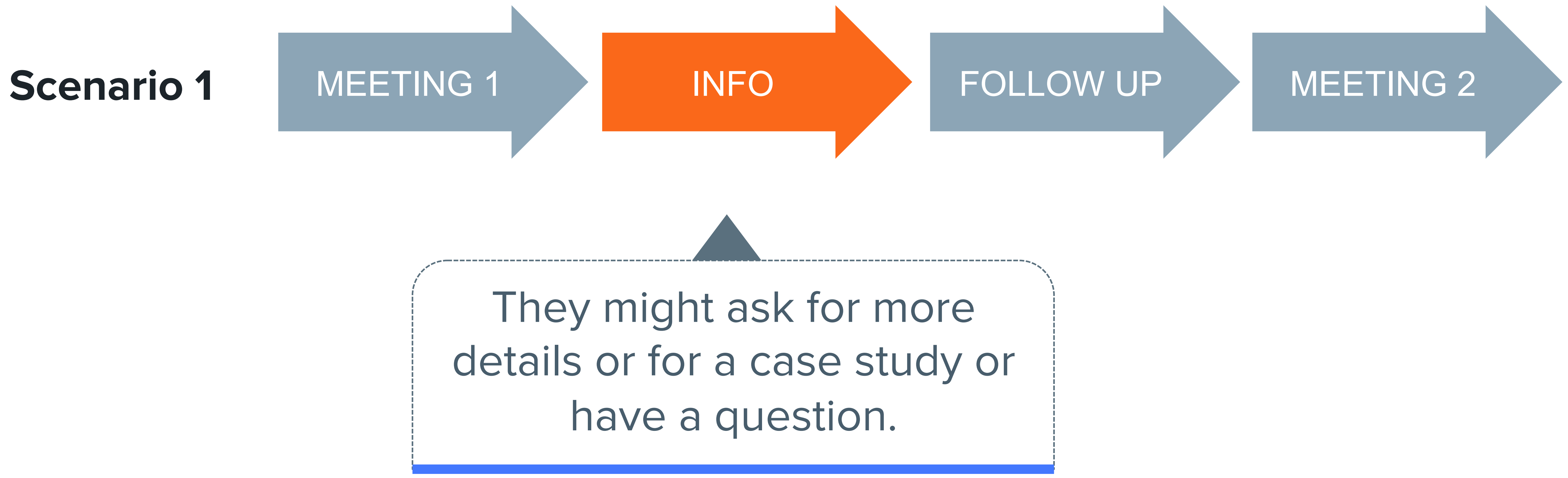

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There are multiple steps leading to a purchase.

Scenario 2

Or neither of you may know the next step so you have to follow up.

There are multiple steps leading to a purchase.

Scenario 3

MEETING 1 → PROPOSAL → FOLLOW UP → MEETING 2

Or they might ask for a proposal, so you work on it with them.

What if there was no follow up?

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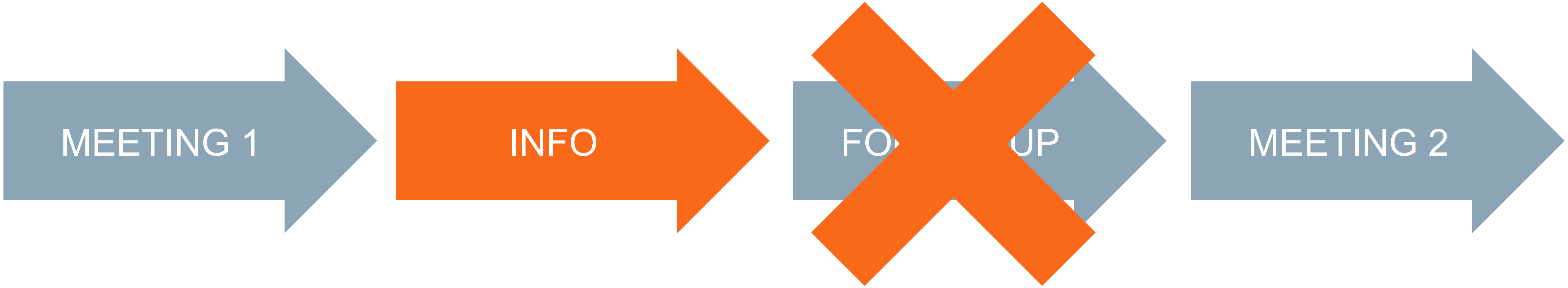

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DON'T FOLLOW UP

THIS IS THE KEY

You should not have to follow up after a meeting.
You should use each meeting to establish
all the next steps that are going to happen.

Symptom vs. Problem

Following up is the symptom.

The problem is that you haven't established a buying game plan or established all the next steps.

Take, for example, a headache.

Symptom vs. Problem

A person has a headache so that person takes Advil. Problem solved. Right?

Symptom vs. Problem

A person has a headache so that person takes Advil. Problem solved. Right?

No. The problem is that this person went out the night before, had 4 glasses of wine, didn't eat dinner, did shots, and got home at 5 AM.

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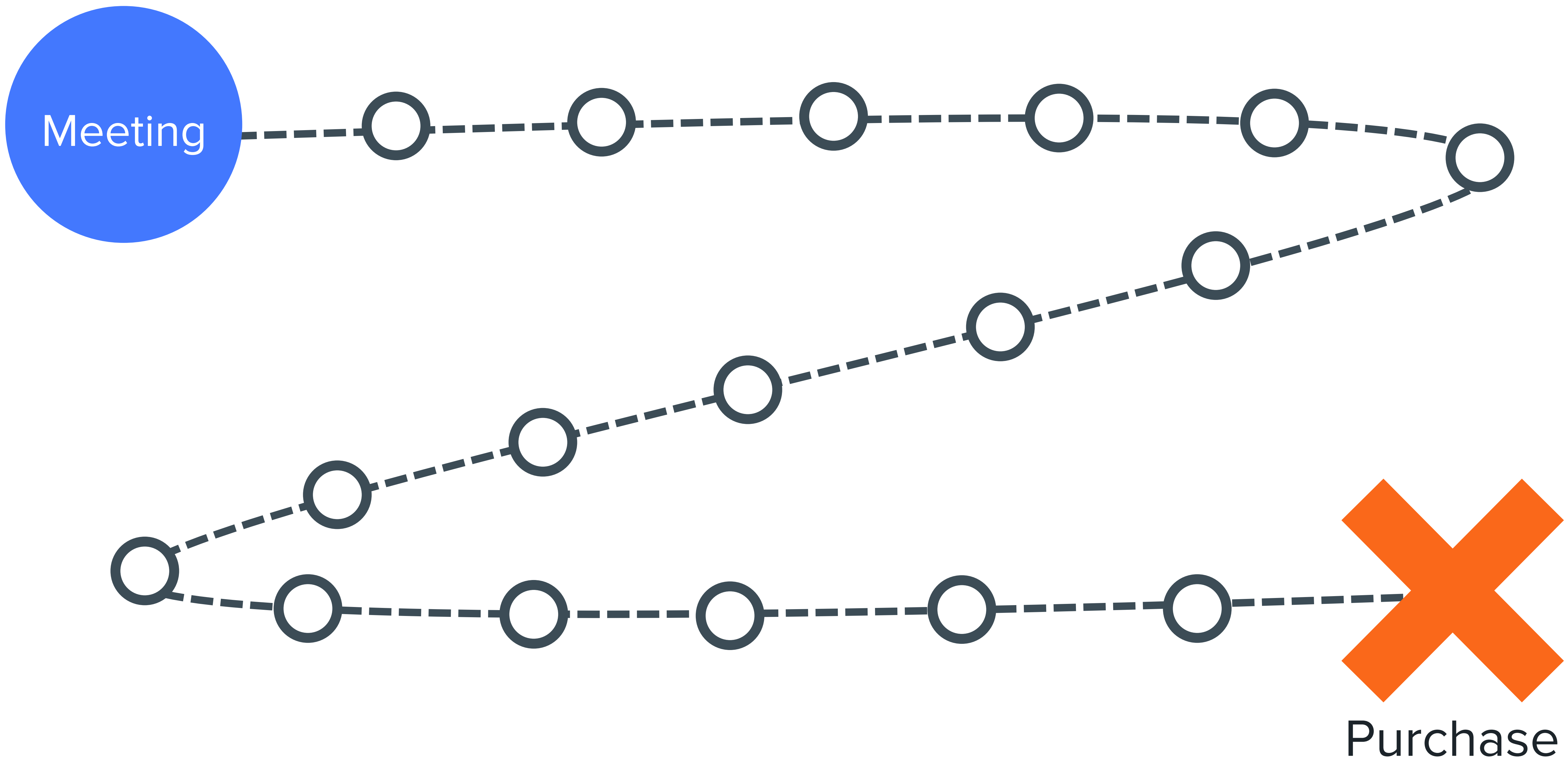
THE FOLLOW UP IS NOT THE PROBLEM

We’re going to show you not only how to cure the headache but how to avoid it all together.

The follow up is not what you want to solve. What you want to solve is how to save time and **not follow up at all**.

Start with the outcome.



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When concluding a call, use the last 5-10 minutes to ...

- Establish if they're actually interested
- Establish if you're talking to a decision maker
- Establish if they have money
- Establish the game plan for the sale
- Establish what makes sense as the next step

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At the end of a meeting …

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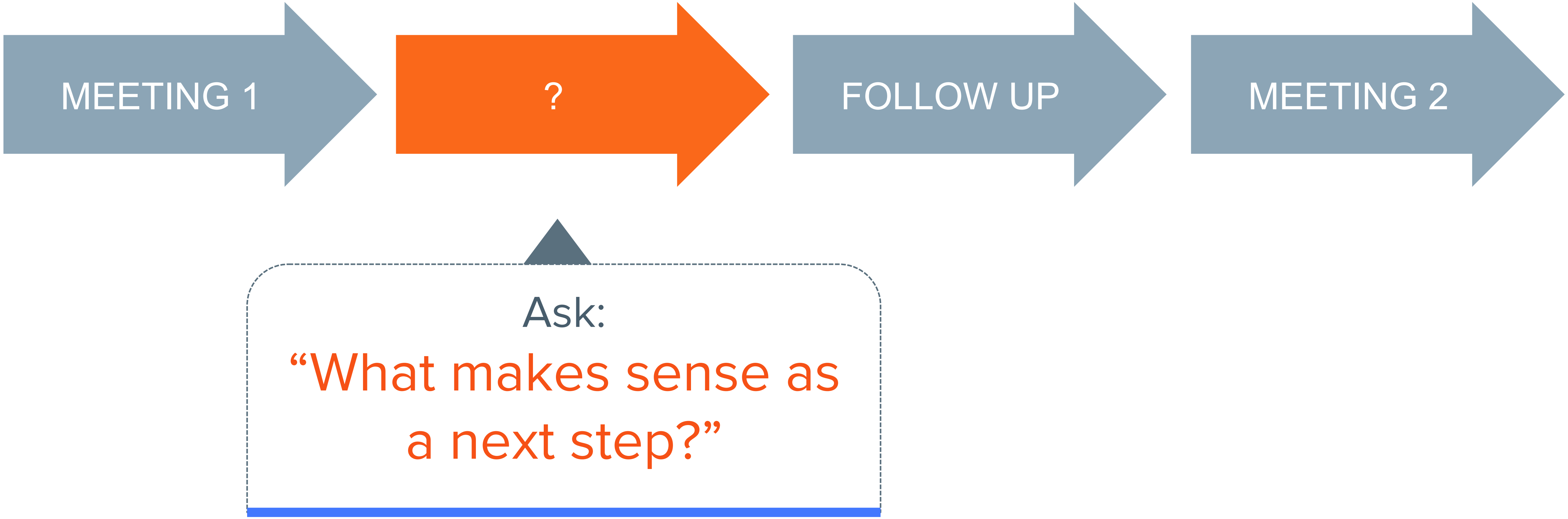

If they want info ...

MEETING 1 → INFO → FOLLOW UP → MEETING 2

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MEETING 1 → INFO → FOLLOW UP → MEETING 2

Ask:

“What kind of info do you want to see?”

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If they ask for a proposal …

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If they ask for a proposal …

Ask:

"What do you want in your proposal? Anything else?

How to stop following up:

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How to stop following up:

MEETING 1 → PROPOSAL → MEETING 2

Ask:

1. “When would you like to receive it by?”
2. “When would it make sense to review it together?”
3. “How does your calendar look that week? What’s a good time?”

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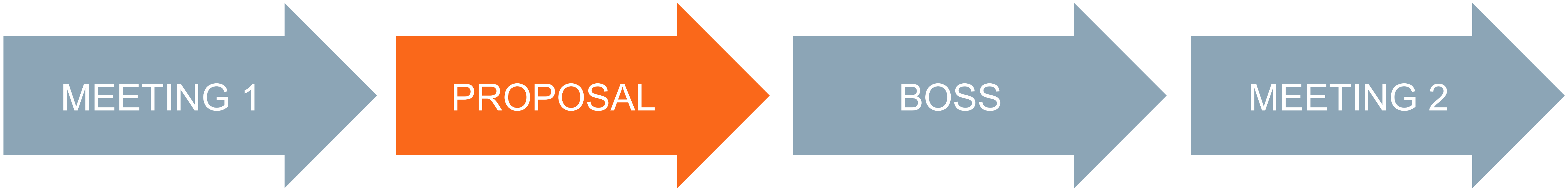
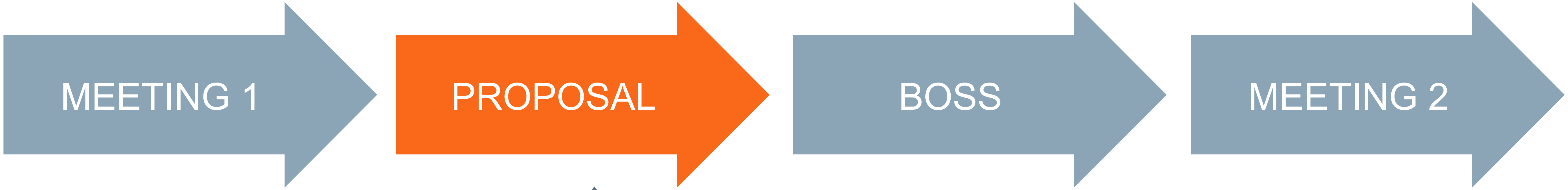
What if someone else is involved?



What if someone else is involved?



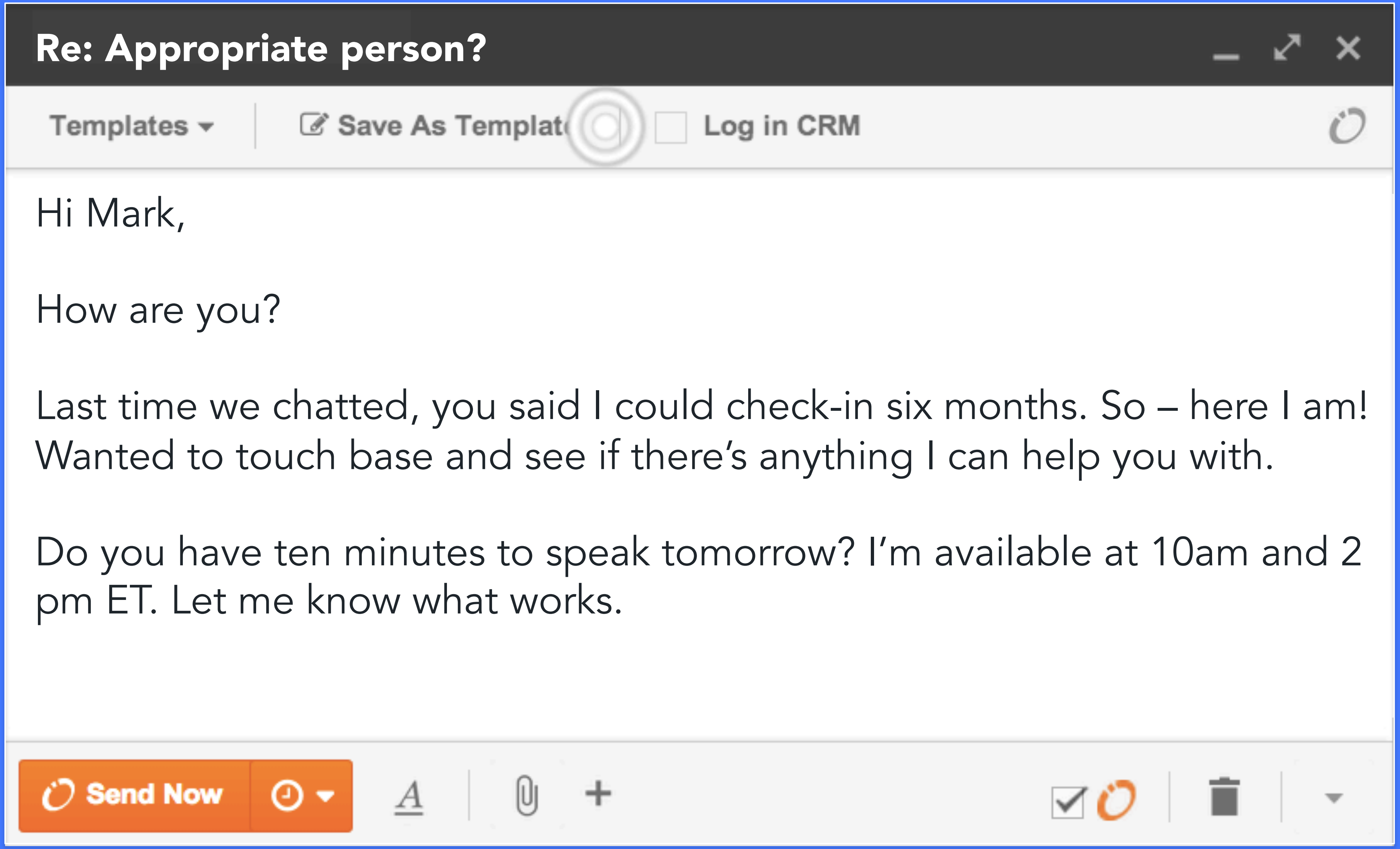
Ask:

1. “When do you think you’ll be able to connect with them?”
2. “When do you think you would be able to hear back from them by?”
3. “When would it make sense to review together?”

2.

How to follow up …
when you get a trigger event

Too many people try following up like this.



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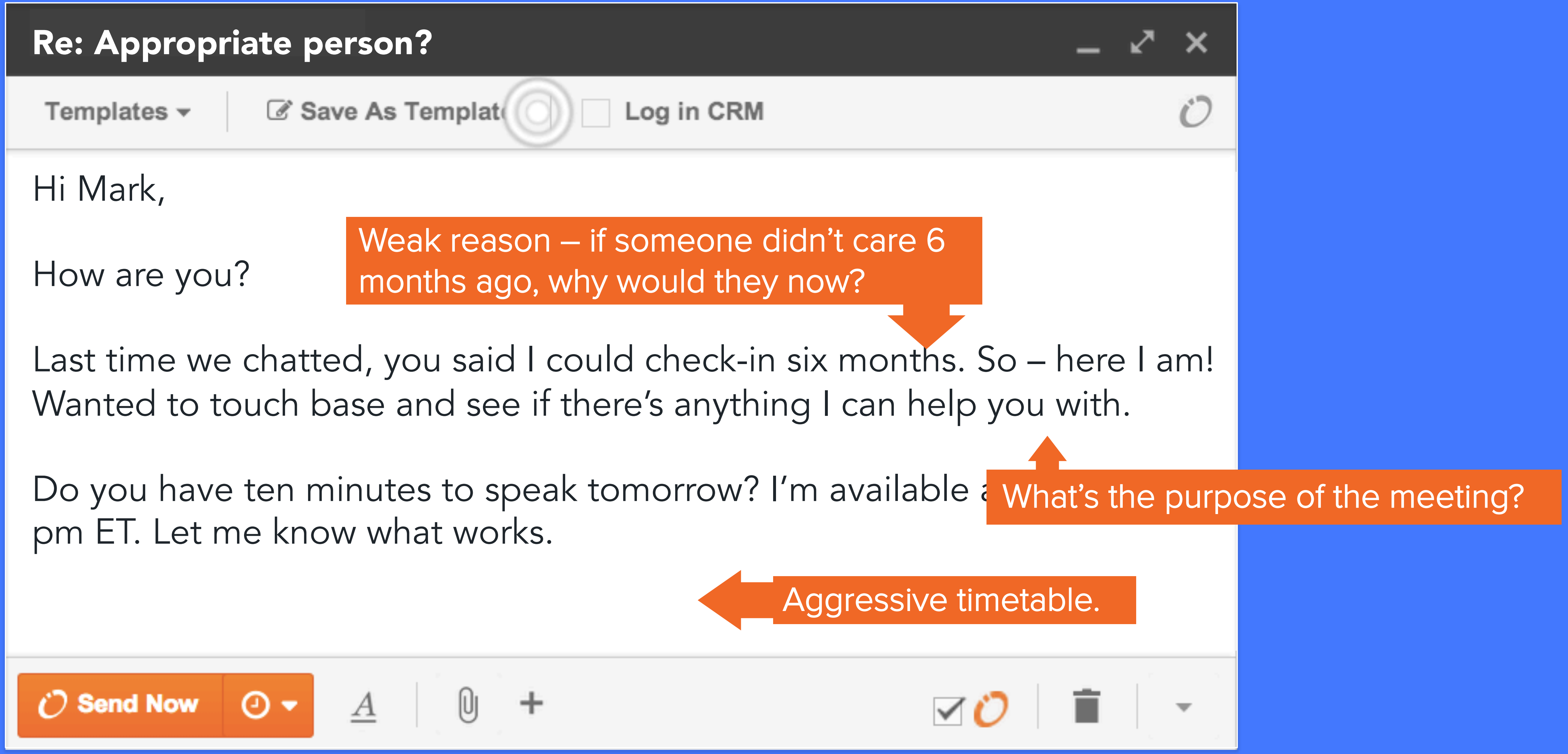
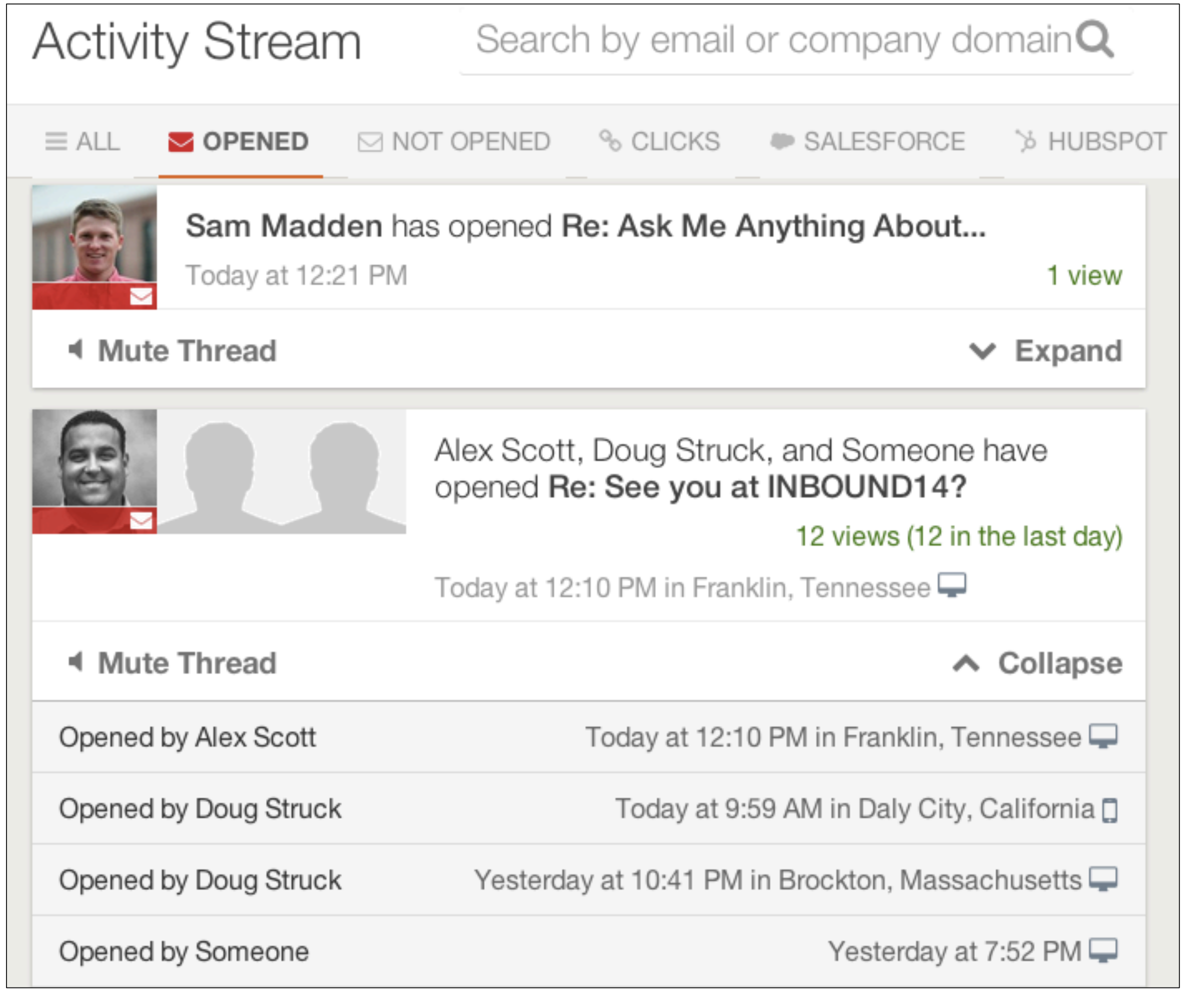
But it's making some major mistakes.



We can’t just arbitrarily check-in.



Instead, use a tool (like Sidekick) to track when your prospect is actually **opening and/or clicking** your email.

That way, if you see a prospect you talked to three weeks ago suddenly clicking on the resources you sent … you can follow up with additional information **relevant** to what they're clicking on.

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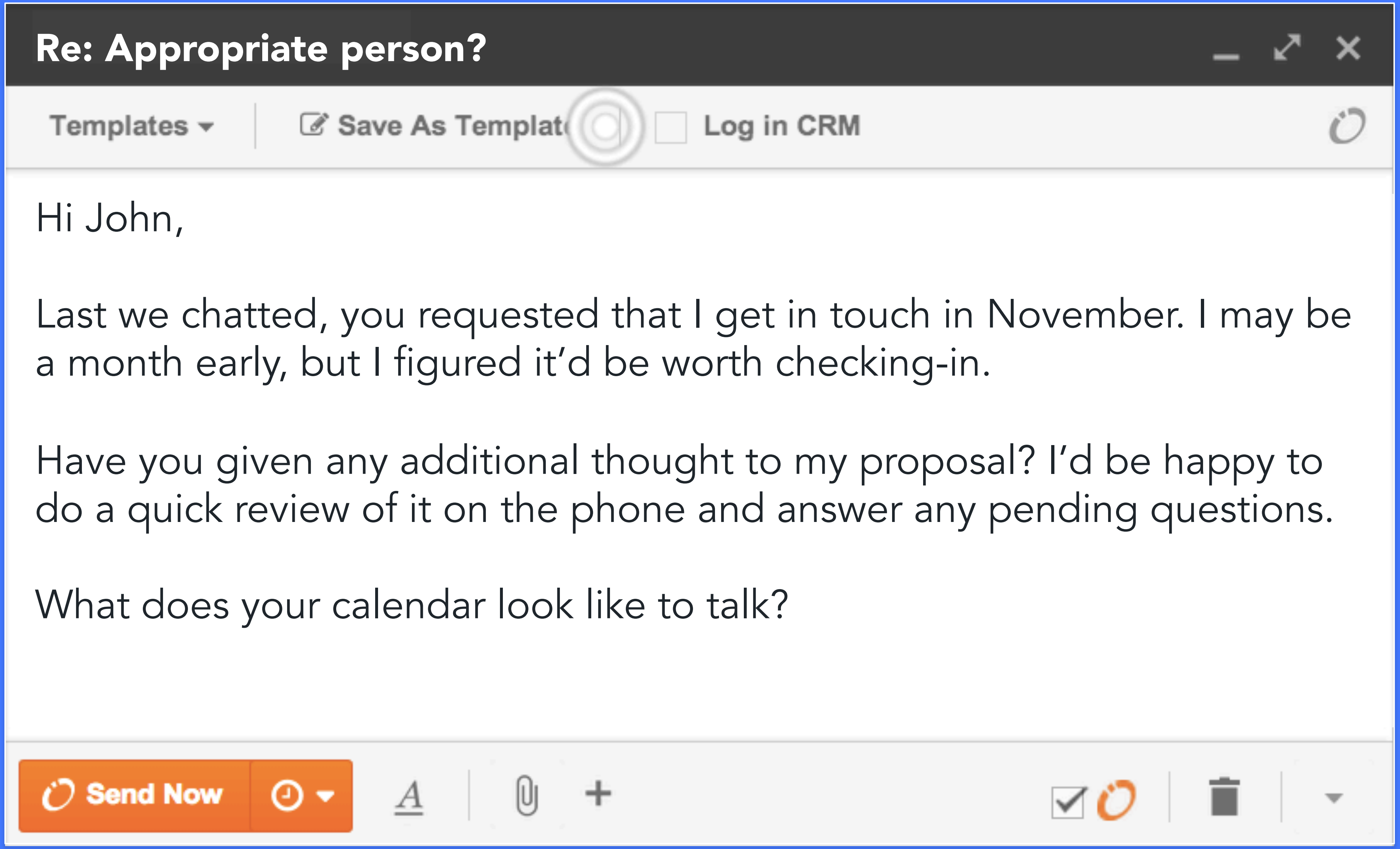
Once you see an email open alert, you can now send this.



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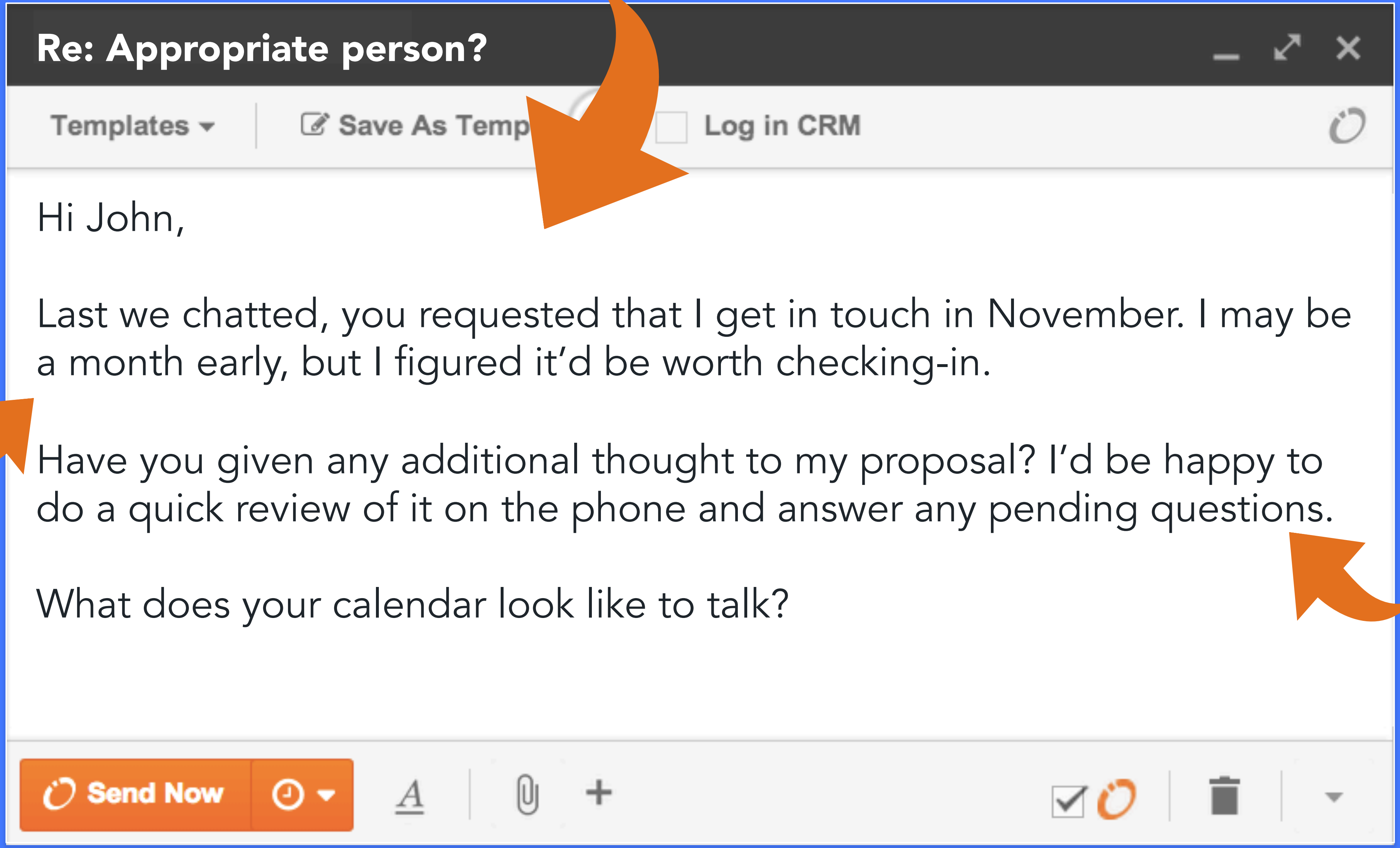
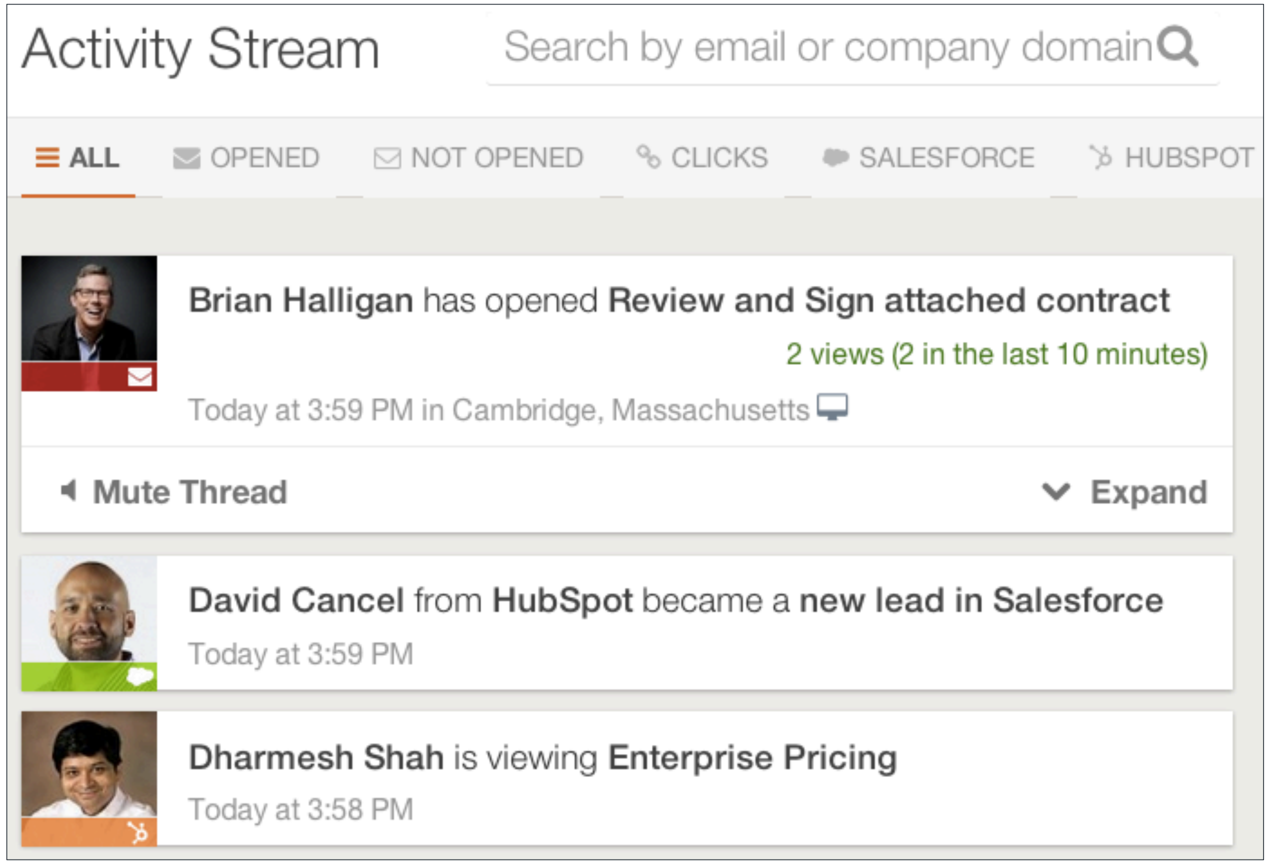
Although a generic-looking opening, you know that the email has been opened 2-3 times RECENTLY.



You're catching them when you know your business is top-of-mind.

The next step isn't to force more info, but to have a quick catch up.

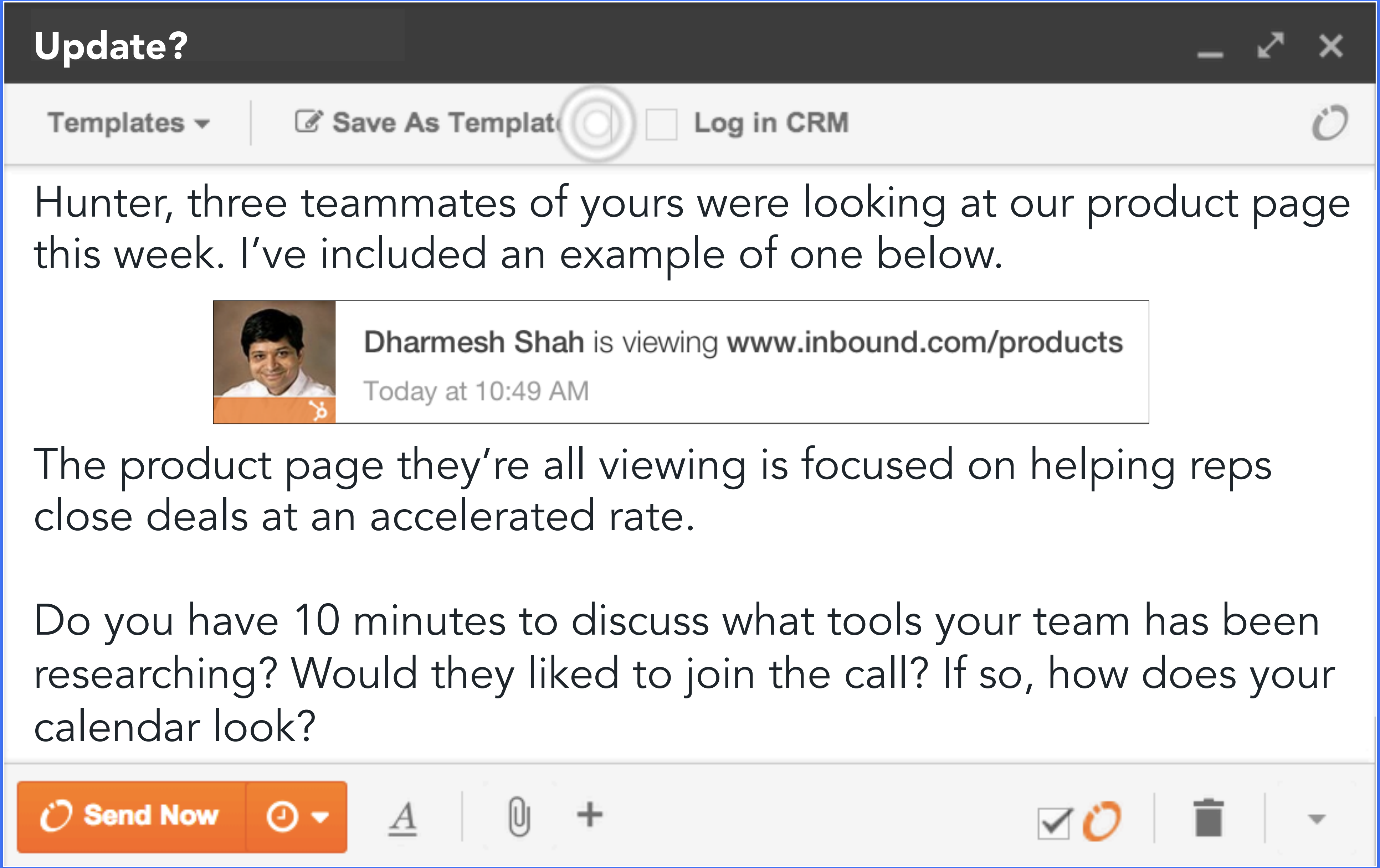
We could also try following up with website activity.



With Sidekick for Business, you can track website visit alerts.

Getting instant notifications unveiling which pages the prospects are viewing on your website can strengthen your follow up in many ways.

These notifications can be used like so -



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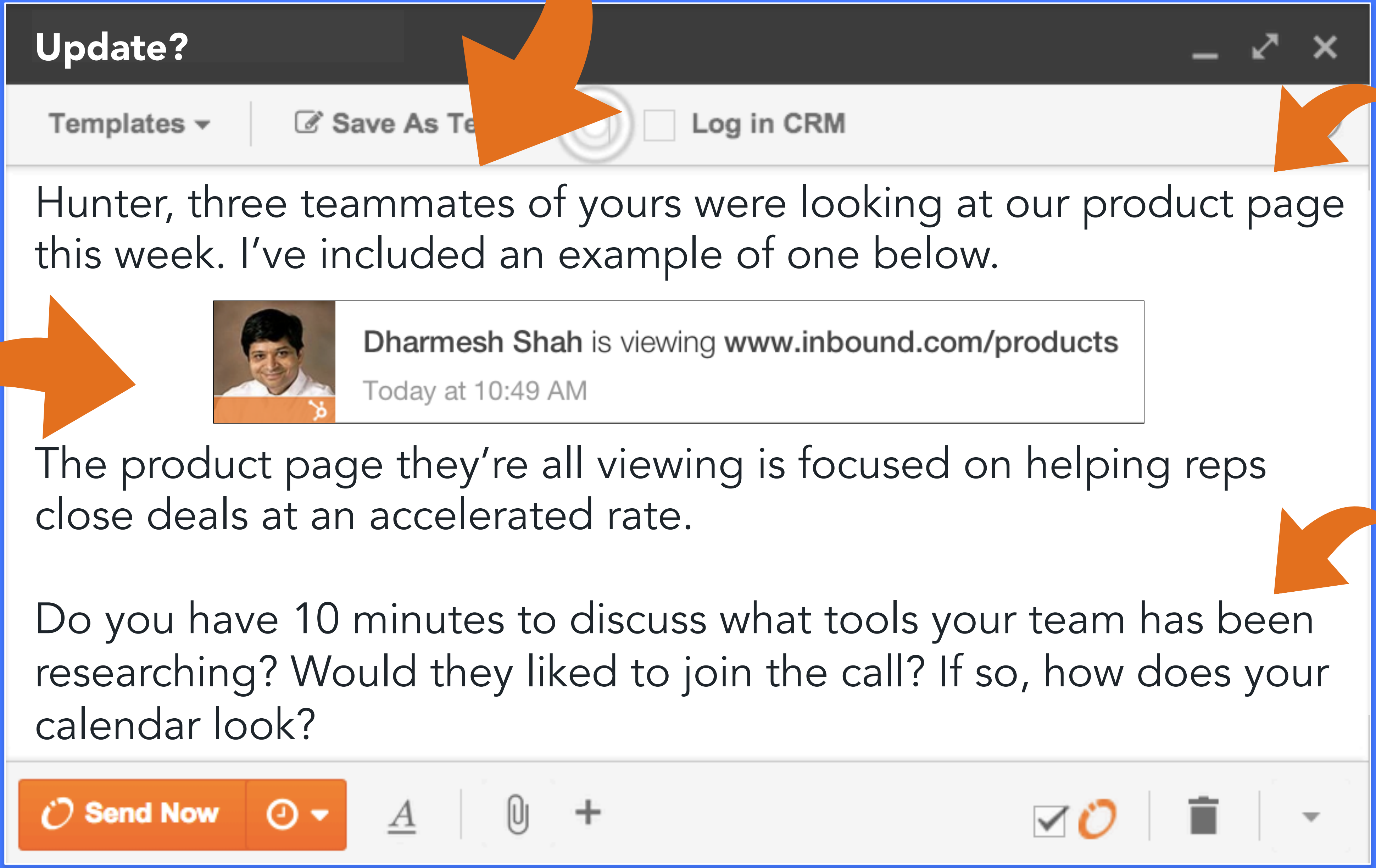
The email immediately opens with activity or information from the prospect.



Sending the email when their team is curious increases the likelihood they'll respond.

There's visual proof that people from their company are interested.

The next step is relevant to what they're researching.

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3.

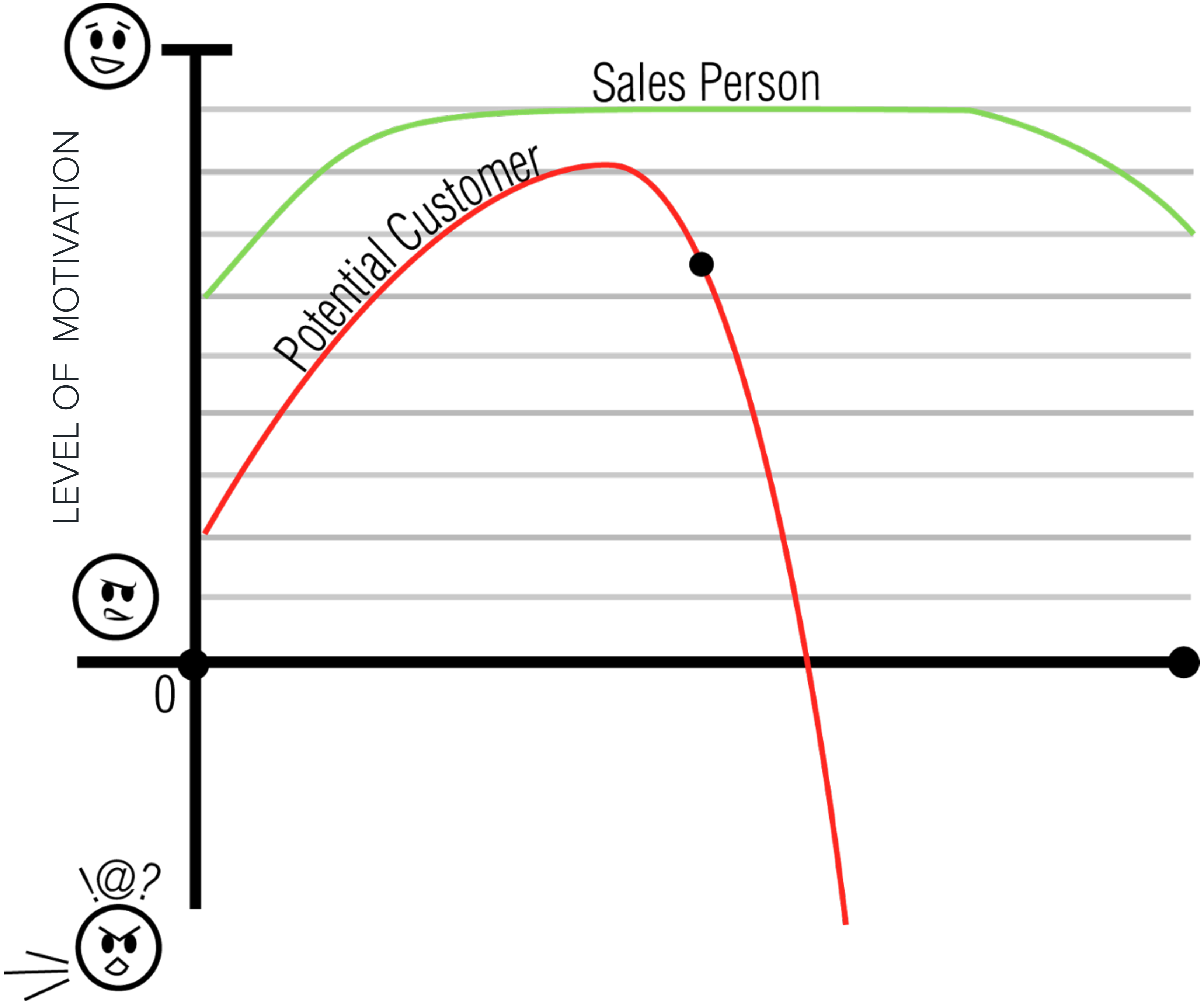
How to follow up …
after a meeting

Following up can risk the sale.

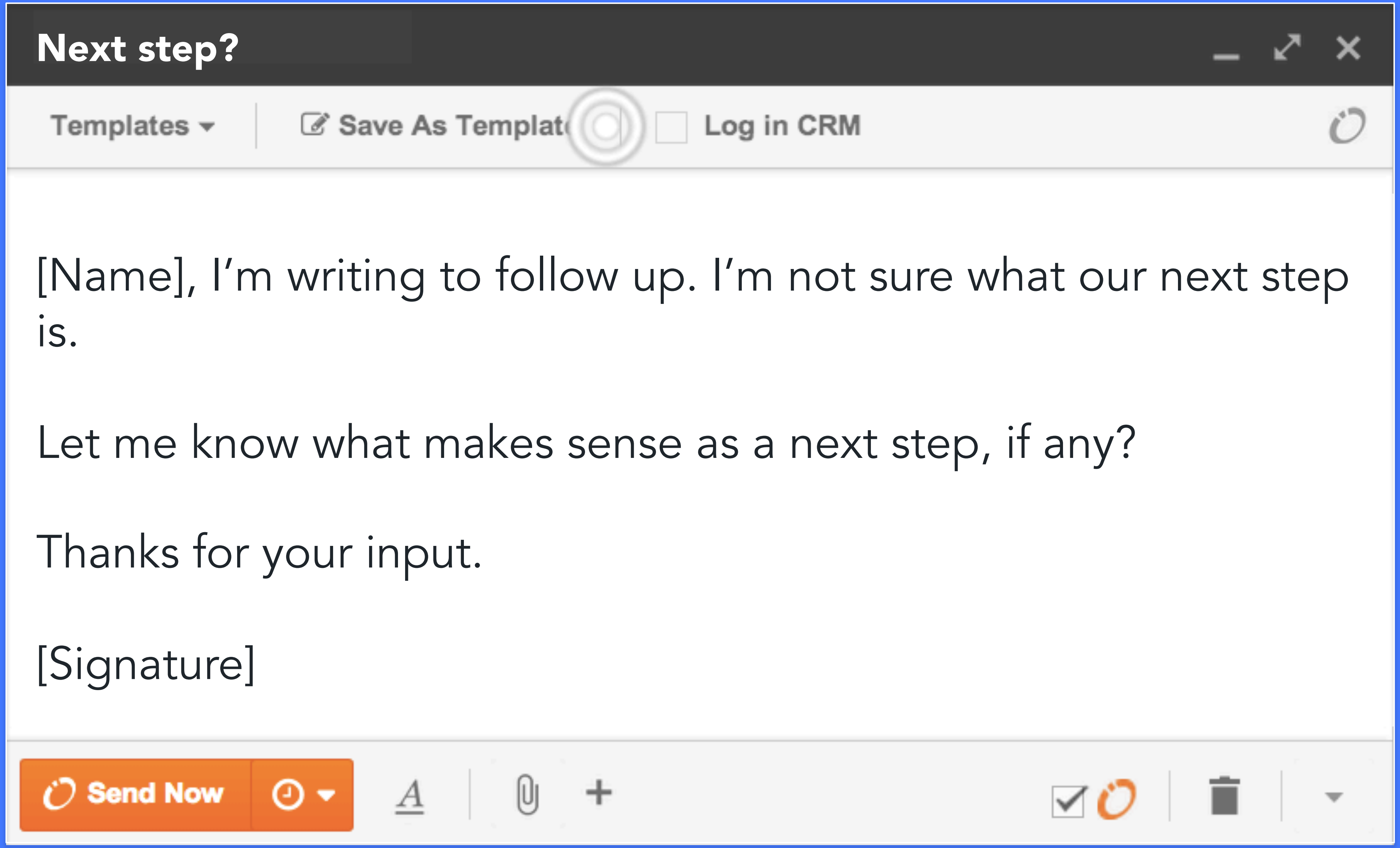
Acceptable Range
Interested but not responsive

Money Zone
Least effort and motivated customer

Buyer motivation plays a huge role.



If we don't set the next call, recover with a "confused" email.



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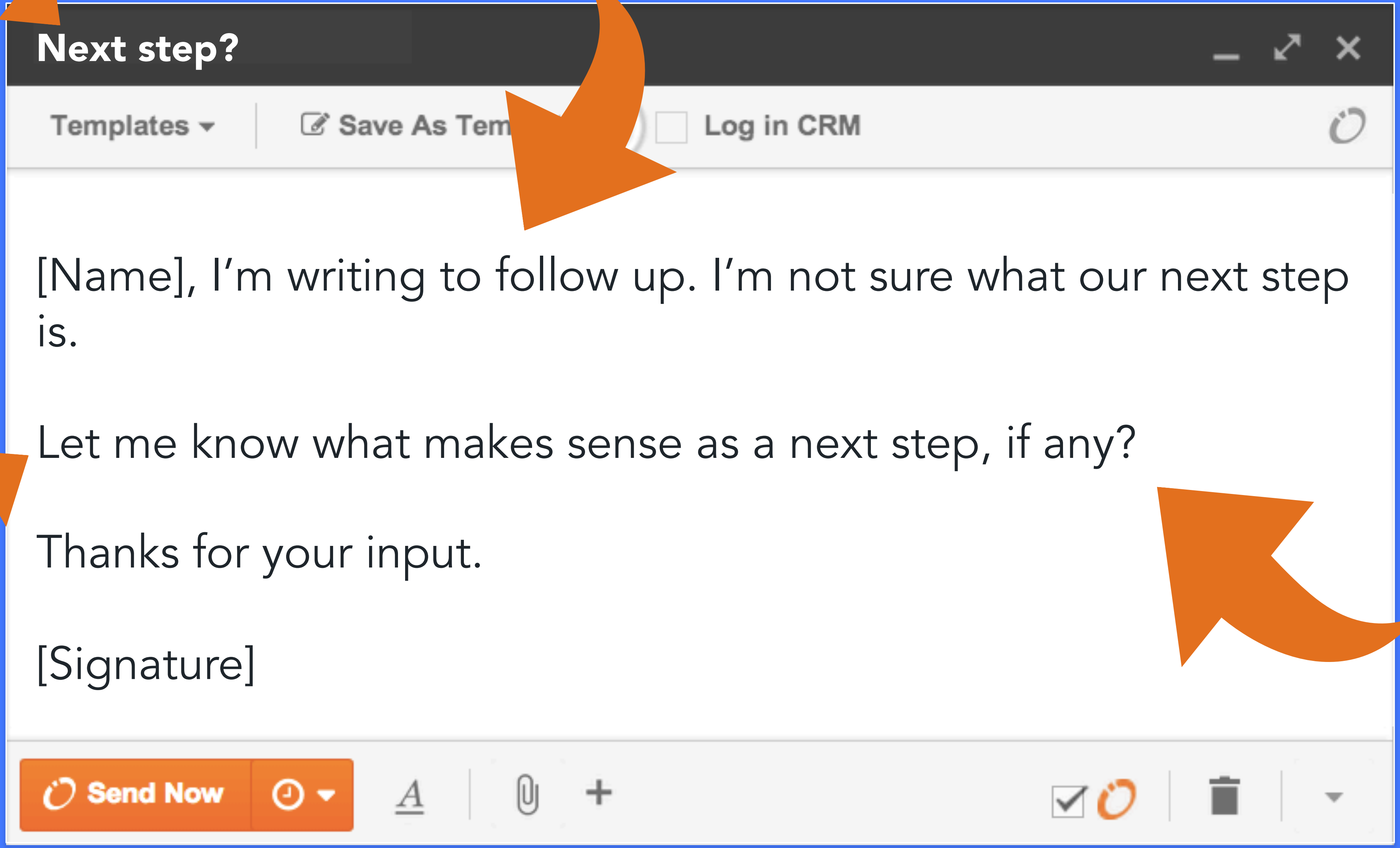
You don’t have to hide the fact that you’re following up.

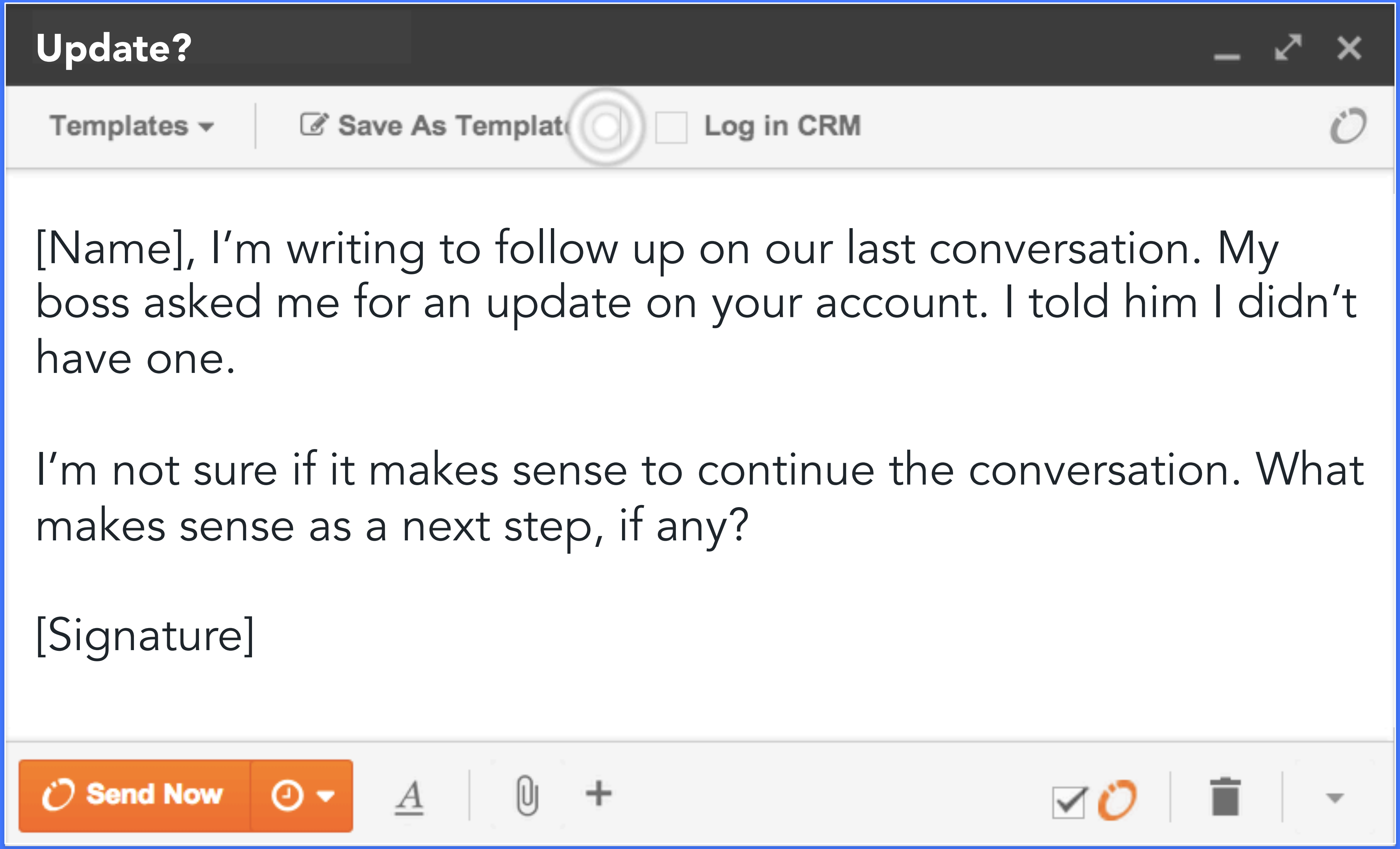
The objective of this email is to find the next step.



This is a clear request. We’re asking if it makes sense to continue. And if it does, how.

This is a key phrase. Since you gently push back, the person is more likely to respond.

Sometimes, you may need a more aggressive approach.



FROM HUBSPOT & BREAKTHROUGH EMAIL

I often substitute "Quick question" or "Next step."

Update?

Templates | Save As Template | Log in CRM

[Name], I'm writing to follow up on our last conversation. My boss asked me for an update on your account. I told him I didn't have one.

I'm not sure if it makes sense to continue the conversation. What makes sense as a next step, if any?

[Signature]

Send Now

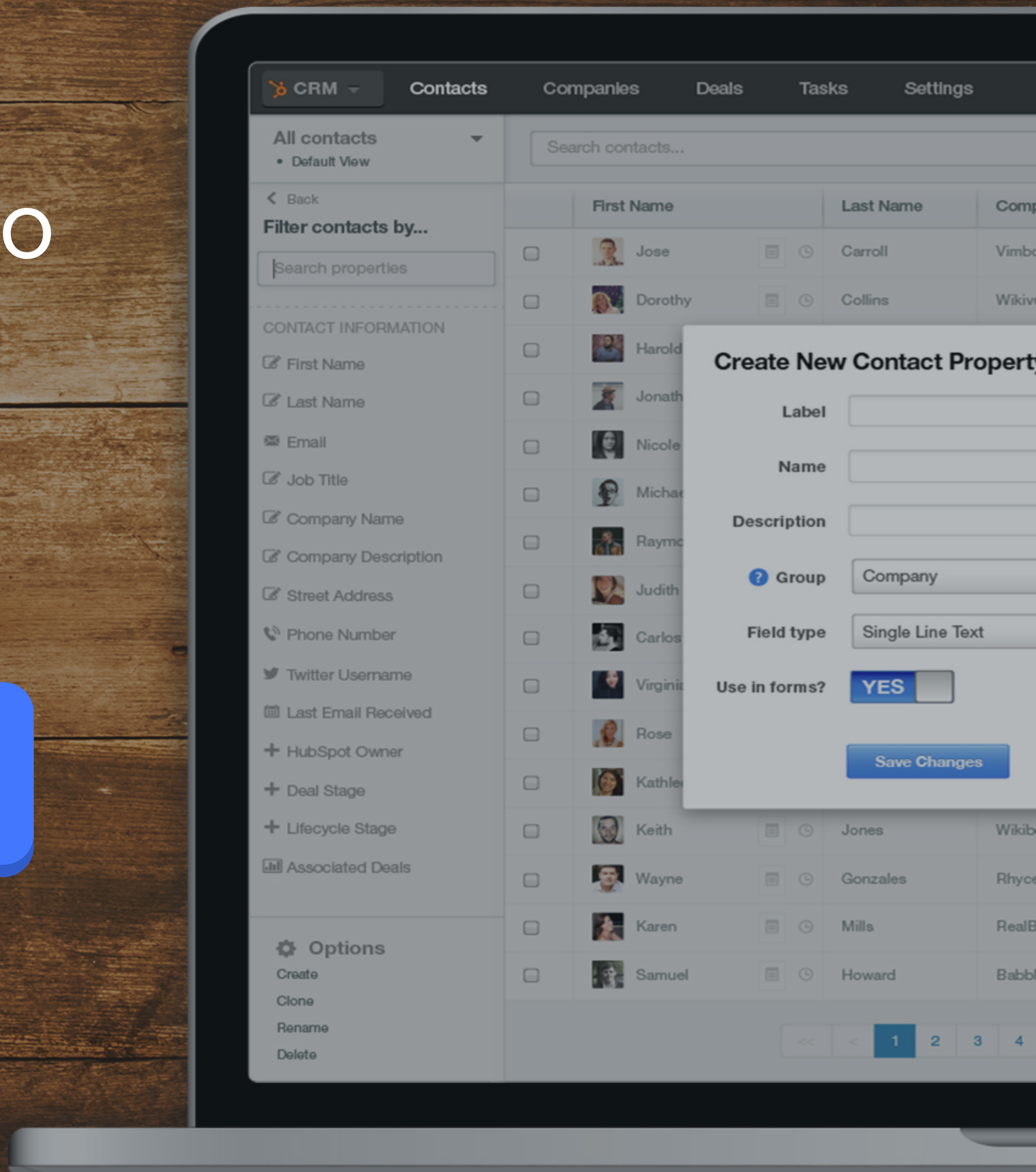
This creates urgency. People relate to having a boss and needing to provide answers to their questions.

Rather than sell them on what they should do, I've found that gently pushing back to get their input works better.

Get Qualified Leads With Buyers

Outsource your lead generation. We send the emails for free, and schedule meetings for you, on your calendar.

Start getting leads


CRM
Contacts
Companies
Deals
Tasks
Settings
All contacts
Default View
Search contacts...
Back
Filter contacts by...
Search properties
CONTACT INFORMATION
First Name
Last Name
Email
Job Title
Company Name
Company Description
Street Address
Phone Number
Twitter Username
Last Email Received
HubSpot Owner
Deal Stage
Lifecycle Stage
Associated Deals
Options
Create
Clone
Rename
Delete
First Name
Last Name
Jose
Carroll
Dorothy
Collins
Keith
Jones
Wayne
Gonzales
Karen
Mills
Samuel
Howard
Label
Name
Description
Group
Company
Field type
Single Line Text
Use in forms?
YES
Save Changes