

FOLLOWING UP WITH CLIENTS

Following up with clients keeps the sales wheels greased. There are several types of “following up” you should be doing; checking in with new clients, keeping lines of communication open to existing clients, calls to cold prospects that might be ready to talk again, following up on sales appointments. The follow up we want to focus on here is the follow up to clients you have recently spent time with to deliver a sales presentation and determine their needs.

What do you do after you have just spent 45 minutes on the phone or in person with a potential client?...

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Write a thank-you note

If your potential client gave time to meet with you in person, then it’s a good idea to follow up that meeting with a thank you note or letter sent the very next day. Send a hand-written letter immediately after your meeting to thank your client for his/her time.

You can follow up via email, but everyone uses email now, so a good old-fashioned letter sent *promptly* will get more attention and send the message that you are not ordinary and that you care that much more than the competition that took the easy way out with email.

Keep the letter brief; there is no need to get wordy with your letter. Regardless of how well you think your sales presentation went, or how well suited your product/service is to the client’s need, the follow up letter is not the place to do the selling. The follow up letter is to thank the client for their time, to communicate that you value them, and to remind them of a future appointment if one has been set.

Set yourself up

The number one rule to good follow up is to set yourself up well for that follow up. Before ending your sales appointment or call, clarify a specific date and time for you to meet or call the client again. In addition, clarify what actions you need your client to take before you follow up such as; compiling last year’s sales numbers, or talking to the company’s network administrator about a technical issue, or gathering billing statements from the previous quarter. Spell out for your client what specific task or information you need from them before you speak again.

Your goal is to gain the client’s commitment to speak to you again, and to set up the expectation for what you intend to discuss in that future meeting/call.

Again, narrow down as much as possible a specific date and time for your follow up call or appointment. It is much easier to call on a client who is expecting your call than to risk interrupting your client’s day.

If you do not have the opportunity to establish a time for following up, then at least state your intentions to follow up such as, “I will call you back next week to discuss...” It’s not as strong as establishing a call back date and time, but it is better than not mentioning your intentions to call back at all.

Initiate a follow-up phone call

Every salesperson will need to make unsolicited follow-up calls at some point. If you weren't so thorough in setting yourself up for a follow up time, or if your client missed your follow-up appointment, or if your sales process begins with a casual presentation call followed by sending out marketing materials, then you will need to initiate a follow up call. Don't wait for clients to call you. Take action and make a follow up call to them after a reasonable time.

Have a reason to call back though. Don't just call back and ask, "Are you still interested?" or "Did you get a chance to read the information I sent?" Just like the first cold-call you made to this client, you have to communicate a reason for the client to remain on the phone with you. Be creative. Don't duplicate your sales pitch. Instead, offer new information.

Structure your follow-up. Salespeople tend to think they are "over the hump" once they've done the initial sales presentation to a client. As a result, following up is often not as well thought out. Even though you might have a good rapport with your client, delivered a solid sales presentation and have determined their needs, when you do follow up, don't "wing it". Put on your thinking cap:

1. Before you call or meet again, know what your objective is—gain an appointment for an in-person meeting, have the client send you some information to analyze, get the go-ahead to speak with the operations manager about your product, etc. You need to know what your desired outcome is for the follow-up call or meeting even if your call is unexpected by your client.
2. Review your notes from your previous call or meeting. Outline what specific need was identified, which specific benefits met that need, and what specific value (solid numbers) you discussed. If you find any of this kind of sketchy, then, at the very least, that's what you need to make clear on this follow-up call or meeting.
3. Prepare questions you want to ask that will encourage a dialogue that moves the sales process forward with the focus being on clarifying the client's need, presenting your product/service as a solution, and showing value. Remember, you want to bring new information into this conversation rather than just rehashing what you already covered in your previous calls.
4. Create, yes *create*, your call or meeting opener. Just like a cold-call, you have to communicate some very good reason for this person to continue the conversation with you, especially if you have interrupted their day. (Thus why you want to whenever possible, set-up your follow-up by establishing a clear date and time for call back or re-visit.)

Here's an example:

"We spoke last Thursday about... and I left you with some brochures to review... I've been thinking though, you said you operate in a very specialized market because there are only two companies that do what you do... so I think what we really need to consider is... let me ask you..."

Notice how this opening is;

- very customized to this particular client
- ties in to something specific that was discussed in the first call/meeting
- asks a question to encourage dialogue
- offers new information or a new perspective

Just remember that when making follow up calls, don't rely on the general, "did you receive my information?" or "what do you think of the information I left with you?" It's too easy for the client to say, "No, I didn't receive it", or "I didn't read it yet." Then what will you say? So avoid starting your call with such a general question.

You have to make it seem as though there is a compelling reason for your call. Create a good reason if necessary. Did something newsworthy happen that applies to the client's situation? Are there new developments in their industry that affect your client's business? Is there a new perspective to consider? Did you work up some solid numbers to help show the kind of results your client can expect? Do you have a story about a similar company that you helped?

5. Show value on every call you make including your follow up calls. Discuss the results your product/service will bring in real terms and numbers. No matter how you start your follow up call, you should show what specifically your product/service will do for your client's business in terms of meeting their needs.

Most salespeople who don't follow up are not being lazy, but they don't want to seem pushy. Salespeople do have to contend with negative stereotypes, but as long as the follow up is personalized and informative, it will be well received and often appreciated. Believe it or not, most salespeople don't follow up effectively, and it's those that do who get the sale.

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About Janek Performance Group

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