

Follow-Up Routines That Work



MODULE 1

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About Sales Math

Sales Math is a coaching agency, specializing in sales and sales leadership strategies for the banking industry. The team at Sales Math believes having the right system is the difference between your career taking off verses struggling, and that is why we show bankers how to systematize their selling efforts in order to grow quickly with less stress, and still feel good about it."

Visit sales-math.com to learn more about our results-driven process.

About Matt Middendorp

Matt Middendorp is a nationally acclaimed speaker and sales coach with over 20 years of experience turning connections into customers and advocates. Matt's core philosophies of "Learn Together, Do Together, Grow Together" are taught through in-person coaching, online as part of the Cool Bankers Academy, and by his leadership of the invitation only, Cool Bankers Careers group. His clients are making their goals faster and easier based on the confidence and skills gained from learning a sales process tailored to ensure they aren't "just another banker" in the communities they serve.

Visit sales-math.com for free resources on how to make your own goals faster and easier.

Why is Follow-Up Such A Big Deal?

In this workshop, we're going to start looking at different ideas for building relationships over time. Let's be honest, it would be fantastic if every deal closed right away, but that isn't reality. Sometimes it can take years to bring a client on board.

So how do you continue to add value to a relationship over time without it becoming stale?

That's the question we're going to begin answering today.

Continued next slide...

Why is Follow-Up Such A Big Deal?

This session is always one of the most fun to do when I coach in person, and here's why...the brainstorming that accompanies this conversation is always full of energy and creativity. So while you're reading, be thinking of new or interesting ways to engage your customers and prospects.

I can't wait to hear what exciting ideas you come up with.

One of the other important outcomes from this webinar is that we're creating a list of options. The last thing you want is to be the banker who only reaches out when they have a goal to make. That's a recipe to make sure your calls stop getting taken, or your voicemail doesn't get returned.

Instead, if you approach your interactions with the mindset of, "what can I do to add value to my customer/prospect's life today," you will be positioning yourself to be the person they think of when the time is right to make a choice.

LONG HAUL FOLLOW-UP



WHAT YOU WILL DISCOVER

- ✓ With which follow-up option will they find the most value?
- ✓ The rules of keeping prospects engaged past the first set of meetings.
- ✓ When to reach out, and how to be original, as well as interesting, in the process.
- ✓ Worksheet: Follow-Up Basics: In for the Long Ha



- ➔ Too often we fall into predictable and unproductive follow-up practices after the first engagement.
- ➔ Yet almost every new customer comes after it.
- ➔ Long Haul Follow-Up presents an extraordinary opportunity to share value and show your quality.
- ➔ As well as separate yourself from your competitors and minimize price in the process.



KEY
QUESTION



Is our relationship better off
for taking this action?

HOW

LONG HAUL FOLLOW-UP

1. Own responsibility, stay in control, and avoid the black hole
2. Communicate regularly
3. Automate whenever possible
4. Have a goal and design the moment to achieve it

WHEN

LONG HAUL FOLLOW-UP

1. When you said you would
2. Big change in their life or business
3. Special days
4. When you have something of value to add

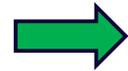
WHAT

LONG HAUL FOLLOW-UP

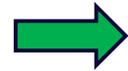
- ✓ Phone
- ✓ Email
- ✓ Lunch
- ✓ Coffee
- ✓ Visit
- ✓ Newsletters
- ✓ Social Media
- ✓ Greeting card
 - ✓ Good to see you
 - ✓ Thank you
- ✓ Text
- ✓ Invite to networking events
- ✓ Volunteer together
- ✓ Gift
- ✓ Sporting events
- ✓ Cultural Events
- ✓ Testimonial
- ✓ Referral
- ✓ Share an app
- ✓ Joint event
- ✓ Fax
- ✓ Mastermind



Don't underestimate these choices and their ability to differentiate your brand.



Two incredibly important ideas to remember...



First, have fun with your customers and prospects.



Second, your choices reflect who this process is really about.



WORKSHEET

FOLLOW-UP BASICS: IN FOR THE LONG HAUL

1. How?

KEY QUESTIONS FOR SUCCESS

DO THE WORK. MAKE IT REAL

NO. 4

1. What does the next step forward with this customer or prospect relationship look like?
2. Has the communicated follow-up expectation been agreed upon by both of you?
3. Have you earned the right to expect a call from your biggest customers when they or their businesses experiences a big win?
4. Who is the next follow-up opportunity I have scheduled?
5. With which follow-up option will they find the most value?

WHAT'S NEXT?



OK – Great Stuff! What's Next?

Here are a few ideas that will help you get to the next level in your follow-up expertise.

- **What types of people will you meet** when you're networking?
- Of those people, *who's worth investing your time in?*
- What's the **FIRST FOLLOW-UP STEP** you need to take to get the relationship started on the right foot and establish yourself as someone worth getting to know?
- What about when they don't buy right away? **What are the rules** of engagement when you're in it for the long-haul?
- Am I delivering enough value in my follow-up to *differentiate myself from the competition?*

The best way to continue developing these next steps in mastering your follow-up process is to work with my new mini-course, Follow-Up Routines That Work. Follow-Up Routines That Work is designed to give you a step by step plan for identifying which prospects are the right ones, what happens immediately after you meet, and how to build relationships over the long haul.

*Follow-Up Routines That Work is normally \$47, but because you were part of this webinar today, I would like to give it to you for **FREE**. Simply copy and past this link to sign up.*

<https://www.sales-math.com/offers/kdp2gESd>

I love it when a banker is able to break through and attack their goals with more confidence than they ever dreamed was possible. I look forward to being part of your future success.

Thank you, Matt Middendorp



EST. 2017

COOL BANKERS

· ACADEMY ·