Following Up After a Sales Call: the checklist

The follow-up checklist · Charlie Roberts

- [ ] **1. Follow up the same day**
  Send the first follow-up the same day, or the next working morning if the call ended late.

- [ ] **2. Recap in one line**
  Restate what they asked for in one line, name one next step, and offer two time windows this week.

- [ ] **3. Put a date on it**
  Every deal gets one status and one next follow-up date. Work the list, not your inbox.

- [ ] **4. Space it out**
  Use a fixed rhythm. Day zero, then working days two, five, eight and fourteen. Never on a Sunday.

- [ ] **5. One channel per touch**
  Use one channel per touch. Email, LinkedIn and WhatsApp on the same day is how you become noise.

- [ ] **6. Change the angle**
  By day five they have seen it. Change the angle, with a relevant example or a single question, not the volume.

- [ ] **7. Make the next step cheap**
  By day eight, make the next step cheap: a 15-minute call, or reply with three bullets: goal, deadline and budget.

- [ ] **8. Close the loop**
  On day fourteen, close the loop. Say you will stop, and leave an easy way back. An out of office is not a reply, so push the date instead.

Full version: **Follow-Up OS** (the pipeline sheet, cadence table and swipe file) — https://payhip.com/b/MOWmN

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