

INTRODUCTORY  
VERSION



YOUR  
**MONEY**  
IS IN THE  
**FOLLOW-UP**



*The Why, When, Where, Who, What, and How to  
Follow up Guide for Small Businesses*

*An award winning small business owner*  
**HELEN L. CALLIER**



## **YOUR MONEY IS IN THE FOLLOW-UP**

The Why, When, Where, Who, What, and How to Follow-up  
Guide for Small Businesses

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For all those who say “I am a winner” when  
crossing the race finish line.

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## **Introduction**

There are three basic phases in the sales process. They are identifying market opportunities and target accounts, presenting solutions, and following-up. Follow-up is vital in the sales process and it is important in the on-going development of your business relationship with your target accounts.

Typically, most small businesses are able to identify and pursue prospects in some manner and then send an email with a link to a website, or mail a brochure or have a meeting to provide a sales presentation. However, where the ball often is dropped is in the follow-up stage. And without follow-through, sales are lost and as a small business your marketing dollars are lost.

Many small businesses often quit midstream and think their probable or existing customer is not interested in their offering. Small businesses become discouraged when the prospect says “no, not at this time” or the small business believes the target account always gives the business to their competitor, or they simply are overwhelmed with other work and forget to follow-up. And without a shadow of a doubt, those small businesses that miss the last and most important element of follow-up

are on-track to fail in closing the sale and hurt their growth.

Sales data shows it takes about seven to ten contacts with a prospect to close a sale. This is the reason to stay consistent, to be determined and committed in your sales and marketing plan. Being focused on your business goals and follow-up plan enable you to build customer relationships. Your follow-up actions show that your business is doing its part to nurture and build a relationship with target accounts. And solid relationships grow your business revenue.

*“Every decent player knows that follow-through is everything in golf. Without the proper follow-through, you will not win! This is a truth in business too.”*

Helen Callier, President, Bradlink LLC, an award winning small  
business

**How to use this book?** Grab you tablet, android or pencil and paper! Take notes, highlight the tips that resonate with you and quickly apply them in your small business. When you begin using the practical tips consistently, even if it is one or two tips, the snowball rolling down the hill builds momentum and starts to make an impact in your small business. Start now and get rolling!



**What you'll find in this book.** In this book, I have put together many practical follow-up tips that small businesses can consider in nurturing their customer relationships. These tips come from many years of my personal experience as a small business owner.

This book is separated into complimenting parts. The parts can be read in order or taken out of order. And the tips in each section can be read in a manner that resonates and suits your interest. Part 1 covers the Why Follow-up? Part 2 presents tips on How to Follow-up? Part 3 on When to Follow-up? and Parts 4, 5 and 6 has tips on With Whom, Where and What to Use to Follow-up?, respectively. At the end of each Part, is a Checklist design to help you develop a great follow-up plan.

**Who should read this book?** This book is written for those small business owners that are eager and searching for a practical and proven way to grow. This book is for start-ups, intermediate and seasoned small businesses, even if it is for a reminder on what they are to be doing. But most of all, this book is for those small businesses that often ask the question, "How can I grow or have more cash in my business? We proceed on to read straightforward follow-up tips because Your Money is in the Follow-up with existing and target accounts.

**How you can contact me.** I would love to hear from you with your comments or suggestions.

Email: [askhelen@yourmoneyisinthefollowup.com](mailto:askhelen@yourmoneyisinthefollowup.com).

Also, you can connect with me on LinkedIn, Twitter and Facebook.

## **Part 1. Why Follow-up?**

### **My Story**

During the early years in my business while hustling to gain a spot on a large Consultant's team pursuing a local government agency solicitation, I found myself being late to the game and the teams had already been formed. And the sad reality was when you missed the window to be on a team and hopefully, be awarded work; not winning meant standing out in the cold waiting for two to three years which was a very long time for a struggling small business like mine was at the time.

After experiencing this scenario time and time again, I made up my mind that I would build marketing muscles by strengthening our executing follow-up strategies with key Consultants' decision-makers. This unique marketing strength of "follow-up" was a game-changer!

I knew that most small businesses quit after a couple of calls or emails here and there and most worked without a plan. I decided to take a marketing stand. I suited up and began running the distance to make the seven to ten contacts. I focused on building long term relationships with well positioned large Consulting firms, maintained

communications with key stakeholders, and stayed visible in the marketplace and with the selected Consulting firm after the contract was awarded to them. And most important, I remained in touch with the winning Consulting firm while knowing their team was fully assembled. I knew that changes could occur in the project scope resulting in a shift and a possible opening for my small business to serve.

My business provides technical services in the Government marketplace where there are public agency board meetings, City Council meetings, pre-proposal meetings and many other opportunities to glean market information and to stay visible.

Regularly, I attended agency board meetings, listened to board discussions, and assessed opportunities such as if their selected Consultant fully met their small business contract goal. If not then I would immediately contact the Consultant's Project Manager to present our value. If the selected Consulting firm's small business goals had been met then I would contact the Project Manager or higher up and congratulate him/her on their team's win plus humbly share our unique value and services in the event changes in project scope occurred or one of their team members were no longer able to perform.

As a result of this planned and active follow-up through email, phone calls, going to agency board meetings, networking, attending Industry Association luncheons, and scheduling intentional bump-ins, my small business was successful in landing approximately \$5 million in business on a Transit project and by staying in touch and following-up through brief phone calls, voicemail messages, and chats during agency pre-proposal meetings, my small business was successful in securing a portion of a project scope that was not being handled by any of the Prime Consultant's current team members under contract. This resulted in future revenue. And by continuing to use follow-up marketing in our early phase, my small business went on to nurture relationships and pursue work that yielded over \$1,000,000 of municipal work and eventually government agency revenue over \$10,000,000.

# **Tips on Why to Follow-up**

## **1. Win new business**

Your reason for being in business is to satisfy your big why, to make money to support your desired lifestyle or to make a difference through distribution of wealth. For you to achieve your small business dreams and goals with solid cash flow and sales, it is prudent to continually nurture relationships with existing target accounts. Follow-up marketing becomes a must have tool to make this happen.

## **2. Increase sales**

One of the most effective business development, marketing and sales tool is to follow-up. You can contact your client or prospect to say “we have developed a new widget that we believe will be of value to your customers and we would like to schedule an appointment to show you our widget presentation or we are touching base to see how well your our bundles of joy product is meeting your needs”. Follow-up shows you care and are concerned about your clients or prospects requirements. Follow-up keeps you in front of the customer and is one of the most powerful ways to increase sales.

### **3. Build loyal customer relationships**

Loyal customers stay with you through good products and those unexpected screw-ups. They are your bread and butter and without them you do not have a business.

### **4. Build long term customer relationships**

It is cheaper to keep them. You are able to develop with more confidence long range business plans when you have customers on board that have been doing business and continue to do business with you over the long haul. This is builds a sustainable small business with a good foundation for growth.

### **5. Get Paid**

Get to know and stay in touch with your customers' account payables personnel. Doing so helps to insure timely payment of invoices. Make sure you understand and meet your client invoice requirements. Not meeting their requirements can delay payments and interrupt your desired cash flow for your small business.

### **6. Grow Your Business**

I attended a business conference about a year ago where the President and CEO of a large global corporation stated that if you are not growing your

business then your small business is not growing and your business basically will wither on the vine and soon you will close up shop. One key step in growing your business and not drying up on the vine is to follow-up with existing customers and prospects.

### **Part 1.**

#### **Checklist to Develop a Great Follow-up Plan**

- Identify your top clients that generate 80% of your business revenue.
- Indicate the last follow-up date with your top clients
- Note (20) drawbacks for not following up with your target accounts (current and prospects)
- Identify (20) benefits for following up with target accounts

#### **Affirmation**

My money is in the follow-up. I help grow my small business by following up with our top clients.



*“Good contacts require good follow-up, so let them know how much you enjoyed meeting and talking to them. Send a short handwritten note. Make a call or drop a quick email”*

Lauron Sonnier, Author “Think Like a Marketer”

This is only the icing on the cake. Additional tips on why to follow-up are in the complete *Your Money is in the Follow-up* book. Available online at [www.amazon.com](http://www.amazon.com) or [www.barnesandnoble.com](http://www.barnesandnoble.com). Also, visit [www.yourmoneyisinthefollowup.com](http://www.yourmoneyisinthefollowup.com) for more information. Connect on Facebook and follow on Twitter.

## **Part 2. How to Follow-up**

*...”before you call think of three things to say to your target contact. You speak at about a rate of 150 words per minute so even in a three-minute call you can say quite a bit. Remember networking is about teaching, so every conversation, whether face-to-face or by phone is a chance to team. Also, when you get your contact on the phone, ask, “Is it a good time to talk for a couple of minutes?”*

*As you chat, listen for new information about what might be on his or her agenda so you can respond generously, either by giving some useful information immediately or sending some information later or listen for a topic to talk about when you next meet. A good question to get your contact to talk is to ask “what have you been working on lately?” To end the call, talk about the next step and a follow-up date.*

*Anne Baber and Lynne Waymon, Authors “Make Your Contacts Count”*

### **7. A Positive Attitude**

A positive attitude creates an environment where success can occur. A positive mindset and internal spirit causes you to focus on the possibilities and to avoid dwelling on circumstances that may not be

ideal. Having a positive attitude enables your small business to place its best foot forward and transmits a desire to win and be successful at target accounts.

## **8. Be Polite**

This is a simple truth. If you are polite to others, they become polite to you. What you give to others comes back to you. During your follow-up activities, be polite and treat others like you would like to be treated. People do business with people they like. If you are rude and obnoxious, how much business do you believe your small business will obtain?

## **9. Exude Quality and Excellence**

Make sure your company stationary, postcards, business cards, thank you notes, etc are professional and with the utmost quality. Put your best foot forward always. Take the time to make sure your client names are spelled correctly and appropriate titles are used.

## **10. Be Honest**

If you are late on an assignment, say so and then note the action plan to meet client needs. If you ordered or used the wrong specifications to build a client's product, say so and then correct it in a timely manner.

## **11. Have Integrity**

Avoid stretching the truth. Be honest, ethical and things will work out as needed.

## **12. Have Faith**

Launch and execute your follow-up campaign with the belief that you can succeed in winning clients' business. This mindset will allow the universe to line up to support your efforts. To operate with a "awe shucks they are not going to call me back", down in the dumps kind of faith causes you to lose business and close doors at the customer you are pursuing.

## Part 2.

### Checklist to Develop a Great Follow-up Plan

- List three dates you followed up with one of your top clients and describe your level of energy and the character trait you exhibited. For example, I followed up with Mr. Brown at Brown Dog Widgets Corporation because of a late delivery we had made on May 12, 1999. It was after 5 pm on a Friday when Mr. Brown had left a voicemail about not receiving his full shipment. When returning his call, I was exhausted from a long day and was rude when telling Mr. Brown his late and incomplete shipment was the trucker's fault.
- List three ways you can relate to clients when following up.
- List three target accounts to begin your improved communication process during follow-up. What date will you implement the new process?

## **Affirmation**

My money is in the follow-up. I am respectful and caring when following-up with our clients.

*“Most will hope they’ll get invited back, but hope is not a strategy. So immediately after that interview, I sent a nice, personal letter and a gift box with other books. I got a thank you letter back. I continue to nurture this relationship. It is, to me, an asset.”*

Dan Kennedy, Author, “No B.S. Wealth Attraction for Entrepreneurs”

This is only the icing on the cake. Additional tips on how to follow-up are in the complete *Your Money is in the Follow-up* book. Available online at [www.amazon.com](http://www.amazon.com) or [www.barnesandnoble.com](http://www.barnesandnoble.com). Also, visit [www.yourmoneyisinthefollowup.com](http://www.yourmoneyisinthefollowup.com) for more information.

## Onward and Upward

If you have successfully analyzed your marketplace, the industry in which your small business serves, and you clearly know your ideal target customers then stay the course! Develop and execute your sales and marketing plans in a consistent and fired-up manner. And make sure to engage your special marketing tool of success and that is follow-up! When doing so, your small business' planted seeds at target accounts will sprout and eventually blossom through your consistent nurturing and follow-up. Remember - **Your Money is in the Follow-up!**

Give me a shout or connect with me online on LinkedIn, Facebook, or Twitter. You can email me [askhelen@yourmoneyisinthefollowup.com](mailto:askhelen@yourmoneyisinthefollowup.com). I welcome the opportunity to continue to serve you.

## **About the Author**

Helen L. Callier, an award winning small business owner, knows first-hand how to successfully steer and sustain a business over the \$1 million revenue threshold. From flying high working in Corporate America as an Executive Staff Level Technical Manager in GE's Jack Welch organization to teetering on the brink of failure as a small business owner to now recognized as a woman-owned small business success story, Helen, in business 10 years, with 2 offices and 30 employees, has touched the lives of thousands of small business owners and helped them on their path to success.

Recognized as a top woman owned business in 2012, received the E10 Award by National Minority Business Supplier Diversity Council affiliate in Houston, TX in 2011, Helen, with a Bachelor's of Science degree in Mechanical Engineering, a Six Sigma Black Belt, is President of Bradlink LLC, a go to Technical Services firm. She lives in Kingwood, TX and has two fun-filled cats, Coree and Jonsen. Helen can be reached via her website, [www.yourmoneyisinthefollowup.com](http://www.yourmoneyisinthefollowup.com).