


Sales Prospecting Follow-Up

CHECKLIST

№	ACTIVITIES	<input checked="" type="checkbox"/>
Day 1	Initial Contact Action: Send initial outreach/email Notes: Introduce yourself, your company, and purpose of contact.	
Day 3	First Follow-Up Action: Follow-Up email or phone call Notes: Reference previous contact, offer value, suggest next steps	
Day 7	Second Follow-Up Action: Personalized follow-up message Notes: Include valuable content, case studies, customer testimonials and success story's	
Day 10	Additional Outreach Action: Connect on social media (LinkedIn, Twitter) Notes: Engage by commenting or sharing relevant content	


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No	ACTIVITIES	
Day 14	Phone Call Follow-Up Action: Make a follow-up call Notes: Revisit previous discussions, understand better customer needs, address concerns, offer solution and value.	
Day 17	Provide Insights Action: Share industry insights or articles Notes: Showcase expertise, attach customer testimonial of using the product showing the value to the existing customer (create product credibility), offer value-added information.	
Day 21	Personalized Email Action: Send a tailored follow-up email. Notes: Address specific pain points or challenges discussed.	
Day 28	Follow-Up Meeting Action: Schedule a follow-up meeting or demo. Notes: Set the meeting goals, understanding needs, presenting solution, addressing questions, next steps.	

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Day 32	<p>Value - Added Resource (before the demo call)</p> <p>Action: Share a case study</p> <p>Notes: Highlight success stories relevant to prospect use case or needs .</p>	
Day 35	<p>Demo meeting</p> <p>Action: Lead demo meeting</p> <p>Notes: Goals of the demo meeting :</p> <ul style="list-style-type: none">• Understanding needs• Presenting Solution• Building Rapport• Confirming Fit• Addressing Questions• Setting Next steps	