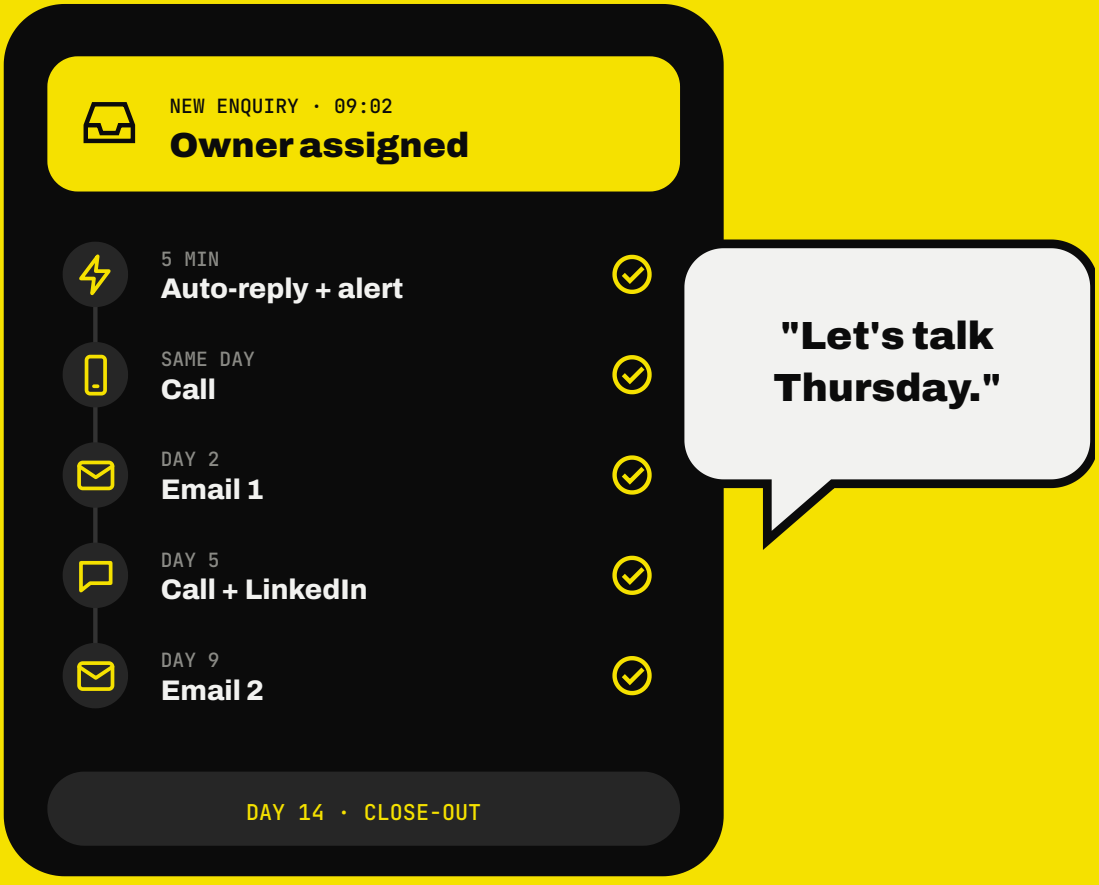
PLAYBOOK + TEMPLATES · SEQUENCES, EMAILS, SCRIPTS

# SALES FOLLOW-UP PLAYBOOK

The sequences, templates and scripts we set up for clients so no enquiry or proposal goes cold.



THE PRINCIPLES

# MOST DEALS AREN'T LOST. THEY'RE FORGOTTEN.

WHY ENQUIRIES GO COLD

- **Nobody owns them**
- **The first reply is slow**
- **Follow-up stops after one email**

FOUR RULES THAT FIX IT

01

## One owner per lead

Every enquiry and proposal has a named person responsible for the next step, and a date.

02

## Speed beats polish

A quick, human reply within the hour beats a perfect one tomorrow.

03

## Persist, politely

Plan for five to six touches over two weeks across phone, email and LinkedIn.

04

## Always a next step

Every call or email ends with a specific ask: a time, a decision or a document.

THE PLAN FOR EVERY NEW LEAD

**5–6** touches

**2** weeks

**3** channels: phone, email, LinkedIn

SEQUENCE A

# NEW ENQUIRY: 14 DAYS

Six touches. Phone, email and LinkedIn.



**WITHIN 5 MIN**

### Auto-reply + alert

Confirm receipt, set expectations, include a booking link. Alert a named owner.

**SAME DAY**

### Call

Personal call from the owner. No answer? Short voicemail, then send email 1.

**DAY 2**

### Email 1

Short, personal, one question. Re-offer the booking link.

**DAY 5**

### Call + LinkedIn

Second call attempt. Connect on LinkedIn with a note: no pitch.

**DAY 9**

### Email 2

Share something useful: a relevant case study or guide.

**DAY 14**

### Email 3: the close-out

Polite "shall I close this off?" email. Often gets the most replies.

**STOP RULES**

Stop as soon as they reply or book. Log the outcome in your CRM and set the next step with a date.

EMAIL TEMPLATES

# COPY, PERSONALISE, SEND

Short, human, one ask each.



## AUTO-REPLY

SUBJECT

**Thanks [First name], we've got your enquiry**

Hi [First name],

Thanks for getting in touch about [topic]. [Owner name] will call you today. If it's easier, pick a time here: [booking link].

## EMAIL 1 · DAY 2

SUBJECT

**Quick question about [topic]**

Hi [First name],

I tried to call earlier. Before we speak, what's prompting you to look at [topic] now? Happy to talk whenever suits: [booking link].

## EMAIL 2 · DAY 9

SUBJECT

**How [similar client] tackled [problem]**

Hi [First name],

Thought this might be useful: [one-line case study + link]. Worth a 20-minute call to see if a similar approach fits?

## EMAIL 3 · DAY 14

SUBJECT

**Shall I close this off?**

Hi [First name],

I haven't heard back, so I'm guessing timing isn't right. Shall I close this off for now? If it's still on your list, reply "later" and I'll check back in [month].

## PERSONALISE THE BRACKETS

[FIRST NAME] [TOPIC] [OWNER NAME] [BOOKING LINK] [SIMILAR CLIENT] [MONTH]

SEQUENCE B

# AFTER THE PROPOSAL

Don't just wait. Plan every step.



BEFORE SENDING

### Agree a decision date

On the discovery call: "If this looks right, when would you want to start?" Book the review call.

DAY 0

### Send it

Proposal plus a short summary email, with the review call already booked.

DAY 2

### Review call

Walk through it together, handle questions, confirm who else signs off.

DAY 7

### Help them decide

A case study, references, or a one-page summary for their board.

DAY 12

### Call

"Where are you with it? Anything stopping you?"

DAY 21

### Close out

Close-out email. Record the outcome: won, lost (and why), or parked with a date.

### Record every loss reason

PRICE · TIMING · FIT · WENT ELSEWHERE · NO DECISION

Review quarterly. They tell you what to fix.

### Parked ≠ lost

Set a reminder for the date they gave you. Many "not now" deals close later.

ON THE PHONE

# THE FIRST-CALL SCRIPT

Four steps. Always end with a date.



STEP 1

## Open

"Hi [name], it's [you] from [company]. You got in touch about [topic]. Is now still a good time?"

STEP 2

## Understand

"What's prompted you to look at this now?" · "What happens if nothing changes?" · "Who else is involved in the decision?"

STEP 3

## Qualify

Timescale, rough budget, decision process. Ask directly: buyers respect it.

STEP 4

## Next step

"The best next step is [meeting / site visit / proposal]. How does [day, time] look?"

OBJECTIONS

# COMMON OBJECTIONS

Answer with a question. Keep it moving.

THEY SAY
**"Just send me some info."**

YOU SAY
"Happy to. So I send the right thing, what matters most to you in choosing a supplier?"

THEY SAY
**"It's too expensive."**

YOU SAY
"Compared to what? Let's look at what it's costing you not to fix this."

THEY SAY
**"We need to think about it."**

YOU SAY
"Of course. What specifically do you need to think through? I can help with that now."

THEY SAY
**"Now's not a good time."**

YOU SAY
"Understood. When would be? Shall I put something in for [month]?"

PUT IT IN PLACE

# SET IT UP THIS WEEK

Tick each one off. When all eight are done, no enquiry goes cold by accident.

- [ ] **Every lead and proposal has a named owner and a next-step date**
- [ ] **Auto-reply with booking link is live**
- [ ] **New enquiries alert the owner instantly**
- [ ] **Sequence A is set up in your CRM**
- [ ] **The four email templates are saved and personalised**
- [ ] **Review calls are booked before proposals go out**
- [ ] **Your CRM has a loss-reason field**
- [ ] **Parked deals get a reminder date**

EVERY QUARTER

## Review your loss reasons

Price, timing, fit, went elsewhere, no decision. They tell you what to fix next.

NEXT STEP

# WANT A SECOND PAIR OF EYES?

Want this running in your CRM? On a free call we'll look at how you handle enquiries today and show you where deals are going cold.

BOOK A FREE 30-MIN CALL
**wearenv.co.uk/contact**

EMAIL US
**info@wearenv.co.uk**

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