Play Blueprint: Post-Consult Follow Up

Why Run It: Convert clients by moving them to the next step of the customer journey after an initial consult.

Who It's For: Any business that uses sales calls, strategy sessions, or coaching calls as a part of the sales process.

Implementation time: 20-30min

Play Snapshot

The Post-Consult Follow Up revolves around a purpose-built form, where you or your team will record key pieces of data. By designing the form ahead of time with the objective focused on collecting the data that should be gathered at a consultation, you can ensure fewer errors, better data, and a smoother sales process.

You can also automate the disposition of that potential deal based on the outcome of the consultation. Did the deal close? Are they deciding? Are they not a good fit? Based on key outcomes like these, the Post-Consult Follow-up play can add your deal to the correct list in your CRM, schedule a task for your next call, and start the right type of email nurture campaign if necessary

In short, you're creating a systematized way to document the key information you need to close your deal and triggering appropriate next steps in your sales or nurture process.

Pro Tip: As much as everyone hates to run a call or a meeting via a script, it is incredibly beneficial to have one to follow, or at least have a baseline of questions every consultation needs to include. This ensures that you get exactly what you need and eliminates inefficiencies like unnecessary follow up calls.

Quick Start Guide

In-Depth Action Plan

Automations Bank

Measuring Success + What's Next