Play Blueprint: Personalized Check In

Why Run It: To send a personalized message to wow clients and prospects.

Who It's For: Business owners, operators, and salespeople can use this play as a great tool to create fans and convert clients. You'll never miss an opportunity to follow up, reinforce an offer, or simply stay "top of mind" with anyone – inside or outside the business.

Implementation time: 15-20min

Play Snapshot

This campaign is all about helping you stay in-touch with certain prospects or customers. We all know how critical follow-up is in the sales process, but sometimes we forget or get side tracked, and critical follow up doesn't happen.

This play is about creating an automated process that can remind you to follow up at the right time, with the right people, when it's important. This might be a check-in after a sales call, or for someone who attended a webinar or an event, or any other reason a contact might require a personalized follow up.

Pro Tip: Don't simply execute this play to "say hello!" Make sure, no matter how you go about checking in, to include a "next step" or an offer. You don't need to be "salesy," but share a link to an offer, or a link to schedule a call. You want to make it easy to keep the conversation going.

Quick Start Guide

In-Depth Action Plan

Measuring Success + What's Next