

# **FOLLOW UP PROCEDURE**

**After a SALE IS MADE!**

**A GUIDE TO A SUCCESSFUL  
FOLLOW UP PROCESS**

# **A Guide to the perfect Follow Up Process**

**It is imperative that you start  
adopting these follow up  
techniques to maximize your  
persistency after a sale is made.**

# Follow-Up



*After Sale is Made*

- **Day 0-** Simple thank you text (Within 1 hour)
- **Day 2-** Handwritten letter, follow up with an email or text. (Confirm the address)
- **Day 10-** Call for policy review
- **Day 30-** “I thought of you when I saw this” (Article Link - Email, Text or Call)
- **Day 60-** Personal visit “*offer*”
- **Every 3 months** just call and say hey



**Always call for BIRTHDAYS  
Send Thanksgiving Cards**

**Call ALL “missed payments” ASAP  
Call ALL “Cancellations” ASAP**

