[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Sales Follow-Up Plan

Following up a sales opportunity in planned steps instead of ad-hoc chasing: sequence, contact log, and close-out.

Document: Sales Follow-Up Plan **Version:** 1.0

Prepared by: _____ **Owner:** _____

Date: _____ **Review date:** _____

Opportunity details: Salesperson: _____ **Client company:** _____

Client contact: _____ **Opportunity:** _____

Follow-up start date: _____ **Target close date:** _____

Value of opportunity: _____ **Follow-up sequence:**

Step	Date	Method	Message / purpose
1	[Follow-up start date]	Email	Thank the contact and confirm next steps for [Opportunity name]
2		Phone call	Check questions on the proposal for [Client company]
3		Meeting	Agree the decision and the route to close by [Target close date]

Follow-up steps in order 1. Send the opening follow-up on [Follow-up start date], referencing [Opportunity name] by name. 2. Phone [Client contact] at [Client company] if no reply arrives within three working days.

3. Book a closing meeting before [Target close date] and confirm the decision maker will attend. 4. Record the outcome of every contact in the log below the same day.
Contact log:

Date	Method	Contact	Outcome	Next step

Close-out Outcome: [Follow-up outcome] Closed date: [Close date]

Reason won or lost: [Reason won or lost] Handover to delivery: [Handover decision] Lessons noted: [Lessons noted]

Completion checklist: [ ] The opportunity ([Opportunity name]) and target close date ([Target close date]) are named.

[ ] Every step of the sequence has a method and a purpose tied to [Client company].

[ ] The contact log is complete and the close-out records the won or lost reason.