

SALES · FREE STARTER KIT

Your First 30 Days of Follow-Up

A lead tracker, 5 message scripts and a 15-minute weekly routine.

Why follow-up matters

Most small businesses do not lose sales because the customer said no. They lose them because nobody wrote back. A simple tracker and a short routine fix that without any new software.

Your 30-day plan

Week	Goal	What to do
1	Load everything	Add every open lead you can remember: emails, chats, calls, business cards. Give each one a Stage and a Next follow-up date.
2	Start the cadence	Run the 15-minute routine. Send script 2 to anyone silent for 3+ days.
3	Close the loops	Use scripts 3 and 4 after every call and proposal. Send script 5 to leads silent for 2 weeks.
4	Review	Look at your Dashboard: win rate, overdue count, open pipeline. Decide one improvement.

How the tracker works

- 1 Stage**
New → Contacted → Meeting → Proposal → Won or Lost. A lead is always in exactly one stage.
- 2 Next follow-up**
The most important column. Never leave an open lead without a date.
- 3 Flag**
Automatic: OVERDUE, TODAY, OK, SET DATE or CLOSED. Work the list from the top.
- 4 Dashboard**
Counts leads and value by stage and shows your win rate and overdue follow-ups.

Rule of thumb: If a lead answered, follow up in 2–4 days. If they did not, wait 4–7 days. After 2 weeks without an answer, close the loop politely (script 5).

■ The 5 follow-up scripts

Replace the [brackets], add one personal detail, and send. Short messages get answered.

1 · First reply to a new lead

Send within 24 hours of the inquiry or referral.

Hi [Name], thanks for reaching out about [topic]. I would like to understand what you need before suggesting anything. Could you tell me [one question]? If it is easier, we can talk for 15 minutes on [day] or [day]. — [Your name], [Business]

2 · Follow-up when there is no reply

Send 2–3 days after your first message.

Hi [Name], I am following up on my last message about [topic]. I know things get busy. Is this still a priority for you? If now is not the right time, tell me and I will check back later. — [Your name]

3 · After a call or meeting

Send the same day. Recap and set the next step.

Hi [Name], thanks for your time today. What I understood: [problem] and [goal], ideally by [date]. Next step: I will send [proposal/quote/info] by [day]. Is there anything I missed? — [Your name]

4 · After sending a proposal

Send 3–4 days after the proposal.

Hi [Name], did you get a chance to look at the proposal? I am happy to go through it together in 15 minutes or adjust it if something does not fit your budget or timing. — [Your name]

5 · The last message (closing the loop)

Send after 2 weeks without an answer.

Hi [Name], I have not heard back, so I will assume the timing is not right and close this on my side. If things change, write to me anytime and we will pick it up. Wishing you the best with [their goal]. — [Your name]

■ Your 15-minute weekly routine

Min	Step
2	Open the Dashboard. How many are OVERDUE? How many TODAY?
8	Send the follow-ups, starting with OVERDUE.
3	Update Stage, Last contact and the next date for each lead you touched.
2	Add new leads. Close dead ones with script 5.

■ Use AI to write better messages

PROMPT · PERSONALIZE

"Rewrite this follow-up message so it sounds like me: friendly, direct, no pressure. Context: [what the lead asked for]. Keep it under 60 words. Message: [paste the script]."

PROMPT · WHATSAPP VERSION

"Turn this email into a short WhatsApp message with a friendly tone and one clear question at the end: [paste email]."

PROMPT · WEEKLY REVIEW

"Here is my pipeline summary: [stages and counts]. What are the two biggest risks and what should I do in the next 7 days?"

Do not paste customers' personal or confidential data into an AI tool. Use first names and general context only.

Next step: When one list is not enough, the **Sales Pipeline CRM** (Notion), the **Lead Qualification Scorecard** and the **Follow-Up Cadence Planner** take this further. See the Sales bundle (15% off) at gelka.co/templates.