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11 Steps to Creating a Personalized Follow-Up System

The single biggest failure of most investment sales professionals is follow-up. A critical step, it's often neglected or done half-heartedly with a generic *thank-you* email. But today's competitive climate requires a personalized approach tailored to each allocator's specific buyer journey.

These 11 steps will help you establish a process that provides the insight necessary to craft effective personalized follow-ups.

1. Make using your CRM mandatory. It should be the single source of truth that guides your team's efforts.

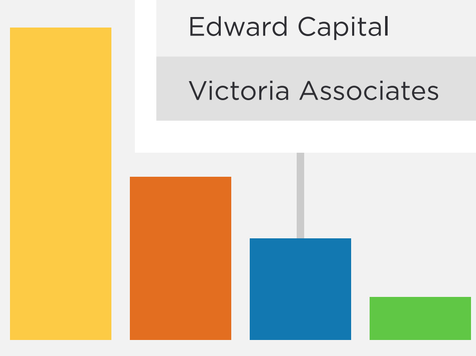
2. Have everyone record all the details of their conversations and efforts in the CRM to inform future touch points.

3. Create pipeline reports that must be monitored and show how each lead is progressing.

4. Establish two opportunity pipeline reports: one for top opportunities and a second for those you're trying to move into the final stages.

Top Opportunities

Account Name	
Breakthrough Investor	$2.1B
Marlin William	$9.7M
Coastline Capital	$4M
BlueMoon Investor	$3.3M
Level Capital	$2M
Consulting Creek	$1.4M
BlueLine Invesment	$1.1M



Proposal Stage

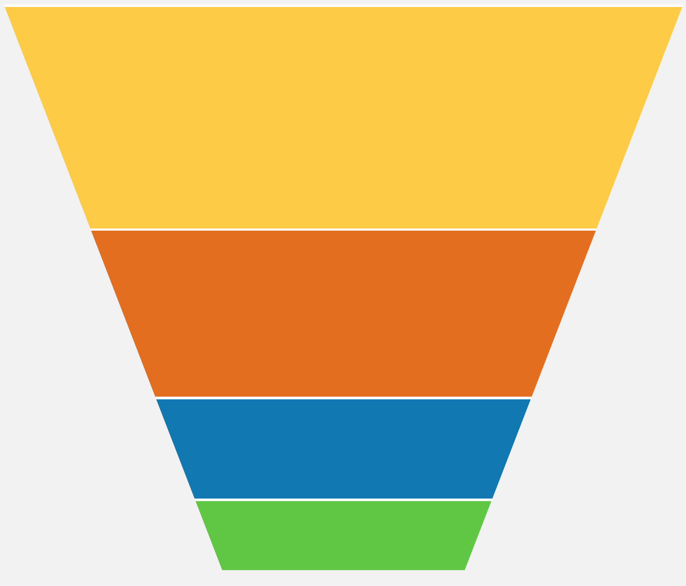
Account Name
Empower Invesment
Reliance
Edward Capital
Victoria Associates

Stage: Prospecting, Investigation, Proposal Made, Negotiation

5. Review the above reports daily to help center your team's focus and show where action needs to be taken.

6. Make another pipeline report for your biggest accounts. Always be working on them and don't lose track of progress.

Top Accounts



Top Accounts

Account Name	
BlueMoon Investor	$2.1B
Level Capital	$9.7M
Consulting Creek	$4M
Empower Invesment	$3.3M
Reliance	$2M
Edward Capital	$1.4M
BlueLine Invesment	$1.1M

Stage: Prospecting, Investigation, Proposal Made, Negotiation

7. Create a *consultant opportunity report*. Consultants will require a different follow-up from other contacts, so keep them separate.

8. Run activity reports for the past two weeks, past 30 days and past 90 days.

9. Review activity reports regularly to identify and inform follow-up opportunities with those you've recently met with or spoken to.

10. Before following up, remember who you're connecting with. Baby boomers, Generation Xers and millennials have different expectations and preferences.

11. Commit to the process and stick to it. Doing it halfway will result in critical gaps in data that will derail your efforts.

By implementing these steps, your team can start to craft personalized follow-ups that leverage information that's specific to each contact's buyer stage as well as details uncovered in previous interactions.

dakota

925 West Lancaster Avenue
Suite 220
Bryn Mawr, PA 19010
Tel: (610) 642-1481
www.dakota.co