

Example Follow-Up Template Workflow

This is an example of a follow up workflow, using social media and email marketing, to process new connections into your formal “network” to maximize your content and stay top of mind.

Read the workflow steps and compare them to your ideal follow up strategy. Evaluate and edit/rewrite each step to match YOUR ideal workflow.

Step 1 - Gather Cards/Contact Information from Those You Met. Create a Spreadsheet of Contacts to Track Data.

Step 2 - Reach Out to Each Person to Connect on Social Media Platforms. [Ex. LinkedIn, Facebook, Instagram]

Step 3 - Send a Message to Connections [Ex. Thank you for connecting! It was great meeting you at X event!]

Step 4 - If There Are Any Connections You Want to Meet with, Send an Email to Schedule a Time [Pro Tip - Use a Calendar Booking Link Like Calendly to Save Time!]

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Step 5 - Send a Follow-Up Email About Any Meeting Requests You Made If No Response After 1 Week

Step 6 - Send a Final Follow-Up Email About Any Meeting Requests You Made If No Response After 2 Weeks

Step 7 - Reach out to Contacts Who Responded & Confirm Meetings / make Introductions That May be Mutually Beneficial

Step 8 - Add New Contacts/Connections to CRM System and Email Marketing List
[Ex. Hubspot, Salesforce, MailChimp, etc.]

Step 9 - Continue Posting on Social Media Channels [Recommended Twice per Week] and Send an Email Newsletter [Recommend Once per Month] to Stay Top of Mind

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