



WORKSHOP: EFFECTIVE FOLLOW UP

SESSION 1: LAYING THE GROUNDWORK – 6 ESSENTIAL TACTICS AND TOOLS

## SESSION 1: LAYING THE GROUNDWORK - 6 ESSENTIAL TACTICS AND TOOLS

Kenny Pratt here. Thanks for joining me in this first of five sessions in the Effective Follow Up Workshop. In this session we are going to be getting our tools together. I'm going to give you 6 follow up tactics and tools that will make follow up easier and more effective regardless of the circumstance. So that's the promise for session 1 – easier and more effective.

I know you are busy, and that means you probably want to get the most out of this as quickly as possible. So, if you are listening to the audio version pause this for a second and grab a piece of paper. It will be much more efficient to take notes as you go. By taking notes and writing your ideas, you'll get more with fewer listens.

If you are reading the transcript of this session, then I would encourage you to take notes in the hefty margin.

### OK, NOW THAT YOU ARE SETTLED IN, LET'S ROCK THIS THING

Like I mentioned in the welcome video, even if your selling skills are unrefined, you can make big gains just by getting good at follow up. Although the different follow up situations require different approaches, there are 6 parts or principles of effective follow up that are universal to all three of the scenarios we are eventually going to cover.

1. Get a name and phone number during the greeting.
2. Get a date needed.
3. Keep track of your prospective customers.
4. Write down personal information the prospect has shared with you during the call so you can use it to continue to build rapport later.
5. Follow up often.
6. Make the follow up job you will be doing in the future easier by calendaring call backs.

So let's take a look at each of these 6 principals in a little more detail.

#### 1. GET A NAME AND NUMBER. SIMPLY ASK.

So the first step of effective follow up is to know who you are talking to and having a method of re-contacting them. There are a number of ways to do this, but the main point here is to simply ask. If you'll just ask, even if you do a clumsy job of it, you will get the info you need most of the time.

Here are a couple of approaches. I give these as a way to get started, but this isn't rocket science, so do what feels comfortable to you.

You can ask in a straightforward manner: “I’m sorry, I didn’t get your name.” [You pause for the Answer] They give their name. “And your number?”

You can confirm what you see on Caller ID. “I see you are calling from 555-1212, is that the best number to reach you at?” [You pause for the answer] “And your name?”

You can give your name and then ask for theirs. “By the way, my name is Sandy, and yours?” [You pause for the answer] “And your number?” or “I see you are calling from 555-1212, is this the best number for you?”

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## 2. FIND OUT THEIR DEADLINE.

At some point in the conversation you need to get a sense for when the customer is going to need the storage space. I recommend that you ask this early in the conversation because it impacts decisions you will make about the type and size of any discounts you may offer and helps you customize the storage package you put together for the prospect. Regarding follow-up specifically, the date the prospect needs the space is important because it tells you what the customer considers their deadline for making a decision.

For example, if the prospect tells you that she needs a storage space by Saturday, then you know that any follow-up you do will have to be between now and Friday because Saturday is probably too late. Try and follow-up after Saturday and you have completely missed the boat.

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## 3. KEEP TRACK OF YOUR PROSPECTIVE CUSTOMERS.

Ok, so now you have a name and number and maybe an email as well and you know when the prospect needs the space. You need a place to keep track of all of this information. I recommend you keep all of the information together on a simple call tracking sheet. Just jot down the info as you go. You can find a sample call tracking sheet that you can download in the resources section of this session.

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## 4. USE THE CALL TRACKING SHEET TO RECORD PERSONAL DETAILS.

Not only is the call tracking sheet useful for capturing names and contact details, but it has a second purpose. As you are talking with the prospect you should be jotting down some of the personal details they are likely to share with you as you discuss their need for storage. If a caller mentions that she is so stressed out about her move, make a note. If a caller talks about how the space is for his mother's stuff because she just passed away, write that down. It will be useful for you to re-establish rapport when you call them to follow-up.

For example let's take the stressed out woman. When you call her back you can say something like, "I've been under a lot of pressure the last few days and it made me think of you and how stressed you were when you called the other day. Are things going any better?" Or, "I know you were really stressed out the last time we talked, are there still a lot of loose ends you have to deal with before your move?"

For the man whose mom passed away, you could simply reconnect by inquiring how the family is holding up. For example, "Hi Bob, I'm calling to follow-up about the storage space you called about for your mother's things. Is the family holding up ok?"

As a side-note - you'll notice that in both of the examples I started with a statement, but ended with a question. Here it is again, in case you missed it: "I know you were really stressed out the last time we talked (statement), are there still a lot of loose ends you have to deal with before your move?" This reminds the other person that you have talked and helps reinforce your connection with them. It lets the other person know you are interested in them and want to hear what they have to say.

The exact words you choose and the topics you choose to talk about should be selected to show caring, concern, and interest in the other person as a person. Don't treat people as a "thing" that will help you achieve your goals, but rather as another human being. I don't think I can effectively teach you how to be tactful, but it goes without saying that tact is a requirement for effectively building rapport.

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#### OK, ON TO 5. WHEN AND HOW OFTEN DO YOU FOLLOW UP?

Now that you have a name, number and some personal details written on your call tracking sheet you are ready for some effective follow up. The questions now become when do I follow up, and how often? There are two simple rules of thumb. The first is that the less committed the prospective customer is, the sooner you have to follow up. The second rule is that the longer the time is between your first contact and when the customer will make a decision, the more times you must follow up.

Let me explain. The first rule is that the less committed the prospect is the sooner you need to follow up. This is generally true because an uncommitted prospect is probably still shopping around and you want to reconnect with him or her after they have done some shopping, but before they make a commitment. This may be as soon as later in the same day as the initial contact. You are trying to re-insert yourself into the buying process so that you can get another chance at making the sale. Contrast this with a person who has set an appointment to come to your store in 4 days. The appointment signifies a much higher commitment and makes follow up within a day of the initial call a bit awkward. In

this scenario a follow up phone call that is postponed until two days before, or one day before, the appointment would be most effective.

The number of times you follow up is determined by how much time is likely to pass between the initial contact and the time of rental. Sometimes more than one follow up contact is the most effective route. If the date needed is less than a month away, then it would be appropriate to make a follow-up contact at least once per calendar week from the first contact until the date needed. In the more rare event that the prospect's need is more than a month away, then I would recommend that you make a follow up contact once per month until one month prior to the date needed, then shift to once per calendar week schedule for the last four weeks.

For a visual explanation of this guidance, check out the calendaring video in the resources section of this session.

If you are going to make a mistake, it's better to follow up too soon or too often than to follow up too late or not enough.

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## 6. CALENDAR THE CONTACTS

If you keep a call tracking sheet and implement all of the follow-up contacting recommended, you will soon need a better system for keeping track of when and who you are supposed to call. Leafing through the stack of call tracking sheets just isn't effective. It becomes too easy for a potential customer to be forgotten or overlooked. Since your follow up must happen before the date the prospective customer said they need the unit I recommend that you use a computer calendar or online calendar to keep track of the calls you must make. I'm assuming if you are listening to this, you are comfortable with a computer, but if you must use a paper calendar, then be sure to use one with plenty of room to write details.

### Notes on the calendar

A small, wall calendar will be inadequate. You won't have enough room to write the details and it will get overly messy as you try to add calls to your schedule.

Many of your computers will already have Microsoft Outlook installed. Using the calendar built in to Outlook is a popular choice for keeping track of the details.

Online calendars like Google Calendar allow you to share your appointments with other users. This could be helpful if you want other people in your organization, like a boss or coworker, to see your calendar even if they are in a different physical location.

If you want to try the online route, I recommend you give Google Calendar a try. You can find it at <http://calendar.google.com>. If you don't already have a Google account, you will need to register for one. It's easy and free.

Another great online alternative is <http://www.30boxes.com>. It is super simple. Like Google Calendar, you'll have to set up a free account for this one as well.

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### MORE NOTES ON MAKING FUTURE FOLLOW UP A BREEZE

I recommend you make your future follow-up as simple as possible by transferring the name, phone number, and the personal details of your prospects to the calendar so it is all right there when you want it. If you only include the prospect's name on your follow up appointment, then you have to go search for the number and other details. This adds friction to the process and makes it more difficult. And if it feels hard, you are less likely to actually follow through. So make it easy on yourself and put all of the details together on your calendar.

I would also recommend that you pick not only a specific day to make follow-up calls, but also a specific time for the calls and record both on your calendar. The more specific you make your plans (I.e. with a specific date and time), and the easier you make it on yourself when the time comes to pick up the phone (by having all the pertinent info ready), the more likely you are to actually follow through.

The easy way to remember - note the calls you take, calendar the calls you make.

HERE'S THE QUICK REVIEW

1. Ask for a name and phone number. You will get it 9 times out of 10.
2. One good reason to ask when they will need the space is so you can find out their decision deadline.
3. Keep a call tracking sheet so you can keep track of the names and phone numbers of your prospective customers.
4. Use your call tracking sheet to write down personal details to use in building rapport when you follow up
5. Use your call tracking sheet to write down details about their situation like why they are storing and the size space they are considering.
6. Follow up often. Follow up will help you bring in more rentals and revenue, the two primary indicators of success as a Property Manager. Follow up is more important than shuffling papers, sweeping units, or browsing the Chateau catalog. As you are gaining experience it is better to make the mistake of following up too often than to not follow up enough.
7. Make it easy on yourself to follow through with your plans to follow up by keeping a calendar with the calls written in as appointments and all of the pertinent details attached and readily accessible.

That wraps up session 1. Check out the Fast Action Workbook in the resources section of this session. The Fast Action Workbook is an easy way to review the ground we have covered. It is also an easy way to begin thinking things through and figuring out how you are going to apply them at your location.

Up next, we'll talk about how to put these tools to use in those times where you have a person who calls or stops in and they want to keep shopping. It happens to everyone more than we would like. Once you know how to use your super-ninja follow up tools from the next session, you'll start converting more of these shoppers to renters.

So, thanks for joining me. I'm Kenny Pratt signing off until next time.