

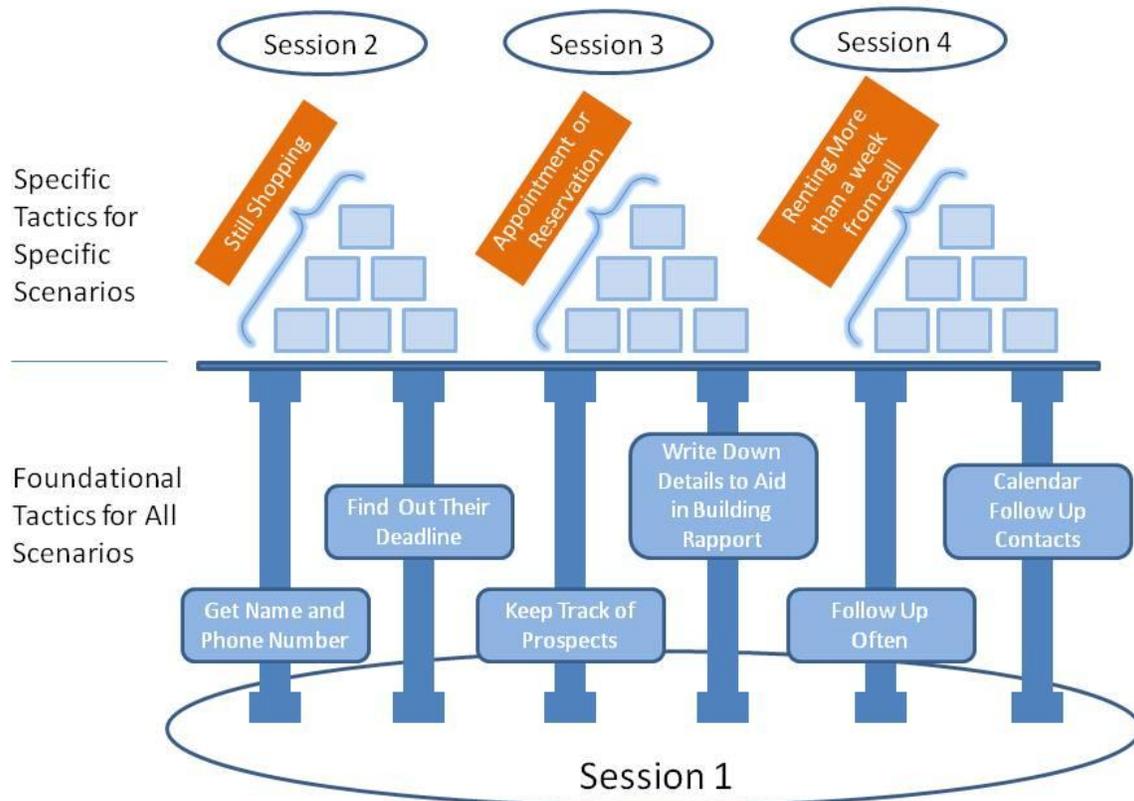


Fast Action Workbook

WORKSHOP: EFFECTIVE FOLLOW UP

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

THE BIG PICTURE OVERVIEW



The diagram above: The building blocks for the each of the three scenarios we will cover in this Effective Follow Up Workshop are on the upper level and they are supported by six columns. Each of the columns represents one of the foundational tactics discussed in this Session. Each of the three scenarios, Still Shopping, Appointment or Reservation, and Renting more than a week from call, are all shown above the foundational pillars along with an annotation showing in which Session we will discuss them in detail.

GET A NAME AND NUMBER

A name and phone number are the foundation of follow up, because without a name and a way to contact the prospective customer, follow up is impossible.

Here are a few ways I suggested that you can ask for a name and phone number. This should help you get started.

- **Straightforward:** “I’m sorry, I didn’t get your name.” [You pause for the Answer] They give their name. “And your number?”

- **Confirming 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?”
- **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?”

You don’t have to say it just like the example. You are encouraged to find a method that feels natural and works consistently for you. Go ahead and add your own style. However you proceed, you will sound more relaxed and at ease if you have practiced how you are going to ask.

Write out your approach in the space below.

Remember to say it out loud a few times. Sometimes what you write down sounds odd or stiff when you say it out loud, and you might decide to adjust.

Now that you know what you are going to say, practice with a coworker or a friend. Have the other person play the part of the shopper and you play your role as the person representing the business. A little practice in a safe environment will do wonders for your confidence and effectiveness. The key is to get to a point where it flows naturally and that you are getting the name and phone number you want consistently.

The first times through were to get it to sound right. Now you are trying to get it down into your brain so that you can say it when you need it. Trust me on this. Feel free to check off your practices below if it will give you a sense of accomplishment 😊.

Practice: 1. 2. 3. 4. 5.

If you don’t have a coworker or a friend available practice saying your approach to yourself out loud another five times. The first times through were to get it to sound right. Now you are trying to get it down into your brain so that you can say it when you need it. Like I said before, trust me on this. Feel free to check off your practices below if it will give you a sense of accomplishment 😊.

Practice: 1. 2. 3. 4. 5.

FIND OUT THEIR DEADLINE

You are probably already asking a question that will work for this. If not, something along the lines of “How soon will you need the storage space?” or “When do you plan on moving your belongings?” should give you the information you need.

If you are not already in the habit of asking, use the space below to write out what you are going to ask to determine your prospective customer’s decision deadline.

Write out your approach in the space below.

Remember to say it out loud a few times. Sometimes what you write down sounds odd or stiff when you say it out loud, and you might decide to adjust.

If you already have an effective question that discovers the prospective customer’s decision deadline worked into your usual approach then just move on.

If you aren’t in the habit of asking something like this, then now is the time to practice. Have the other person play the part of the shopper and you play your role as the person representing the business. The key is to get to a point where it flows naturally and that you are getting the information you want consistently.

Feel free to check off your practices below if it will give you a sense of accomplishment ☺.

Practice: 1. 2. 3. 4. 5.

KEEP TRACK OF YOUR PROSPECTIVE CUSTOMERS AND WRITE DOWN DETAILS

If you haven't already done so, download the call tracking sheet. It is provided in Microsoft Word format so that you can adjust it to suit your needs. If you already have a tracking sheet that you use in your organization feel free to continue to use it. The tool is not as important as making sure you are capturing the right information.

Here are some useful bits of information that I recommend you collect.

- Name
- Phone number
- Decision Deadline / Date Needed
- Approximate Size
- Price Quoted
- Move-in special quoted (if any)
- Details about their situation and what they are storing
- Ideas about what is most important to them (location, security, access hours, price, convenience, etc.)
- Date and time of any appointments set to visit your location or come rent a space
- The day and time of your next follow up contact
- Ideas about how you are going to approach your follow up contact

If you have been using a call tracking sheet, take a look at what you are capturing. Is there anything from the list above that you have been missing that you might want to start noting?

FOLLOW UP OFTEN

Generally, the less committed the prospective customer is, the sooner you have to follow up. Why? Because the prospect is still shopping and you want to insert yourself back into the buying process before the prospective customer makes a decision. Most people shop for storage over the course of a day or maybe two, but not over the course of weeks. If you wait too long to follow up with a shopper you will have missed them.

Here’s a sneak peak at an illustration from the Session 2 Fast Action Workbook that shows this concept visually.



To get a sense of how much time you have before you lose a shopper to a competitor, ask the next few prospective customers who want to shop around when they plan on making the other phone inquiries. You could ask something like: “If you don’t mind me asking, when do you plan on making your other inquiries?”

- Record you answers here:
1. _____
 2. _____
 3. _____
 4. _____

The other rule of thumb is that the bigger the time gap between your initial contact and your prospective customer's need for storage, the more times you need to follow up.

Here's a sneak peak at an illustration from the Session 4 Fast Action Workbook that shows this concept visually.



The more time that passes, the more times you will need to follow up in order to ensure that your prospective customer is sticking with you and has not been wooed by a competitor.

How often do you typically contact prospective customers who are more than a week away from renting? _____

In the space below write some ideas for changes can you make to do a better job of staying in touch?

CALENDAR THE CONTACTS

If you are in the habit of tracking your leads somewhere then go back to your list for the last week or two and start calendaring when you *should* have followed up (for those that have come and gone) and when you will follow up for those leads that are still fresh enough that they may not yet have committed to storing with a competitor.

1. If the prospect is still shopping, schedule some time to follow up between now and their decision deadline. You may have an opportunity to capture the sale.
2. If the prospect has set an appointment with you, calendar a follow up for one to two days before the appointment to confirm that it is happening.
3. If the prospect needs storage sometime next week, when are you going to follow up with them?
4. If a prospect needs storage sometime in the next month, calendar a follow up contact once a week until they are ready to move in.

SUMMARY OVERVIEW

Get Name and Phone Number

- Gives you the ability to follow up.
- Simply ask.

Find Out Their Decision Deadline

- Helps you time your follow up contacts appropriately.
- Most often you learn the deadline by asking when they will need the storage space.

Keep Track of Prospects

- Stay organized with a tracking sheet or lead tracking software.
- Keep track of name and contact info.

Write Down Details to Aid in Building Rapport

- Note personal details.
- Note needs and desires so you will remember how to best help the prospect.
- Referring to details in follow up conversations helps build rapport.

Follow Up Often

- Too much is better than too little.
- Once a week is not too much.
- Later the same day may not be too soon in some circumstances.

Calendar Follow Up Contacts

- Calendar the follow up contacts with a date and time.
- Keep all of the information with the appointment so you don't have to look for it later.