How to Write Forward-Worthy Follow-Up's

A checklist and framework for sales emails during the post-demo stages.

"Just checking in" emails catch a lot of hate. For good reason.

Prospects don't forget to follow-up with sales reps. Instead, they choose to **de-prioritize** the people who they believe can't help them get their job done in the moment.

Here's a short checklist to help boost your reply rate when you need to book a follow-up call. Plus, a framework for "forwardable emails" that will help engage the ultimate decision maker.

The Can't Miss Follow-Up Email Checklist

1. Introduce New Information

- Are you just re-hashing what's already been said? Or introducing a new point of view?

  Your goal is to create a sense of curiosity and the feeling that:

  "Every time I meet with _____, I discover something new."

2. Address the Immediate

- Try to write down your prospects to-do list for today. Actually do it. What does it say?
- Now, look at your email. What does it say?

  If there's no cross-over, revise your draft. Speak to their greatest priority today, and you'll get prioritized on their calendar tomorrow.

3. Leave Them Better Off

- Is your message or meeting going to help them do their job better than they could before?

  If not — because your value is tied to buying a product first — then your buying process isn't valuable. People go where value is. Make your process that place.

4. Write Long, Revise Short

- How many words is your email? Less than 200? Keep on writing then.

  (It's easy to write short check-ins. Hard to write 200 words of value without points 1 - 3.)

- Write 200 words, without any fluff? Great. Now cut it down to 50.

5. Use Their Language

- What phrases did your prospect repeat? What words did they use, different from others?

  Listen to your recordings, reference your notes. Include this language. Show them you heard them and know what makes them, them.

6. Audit Your Ask

- Asking if they reviewed your proposal yet? Or if they saw your Calendly link? Cut this.

  Ask for feedback, an opinion, and a conversation. I like to add at the end of my emails:

  “Your calendar’s crazy, no doubt, so happy to trade emails on feedback if easier than a chat?”

A Framework for ‘Forwardable' Emails

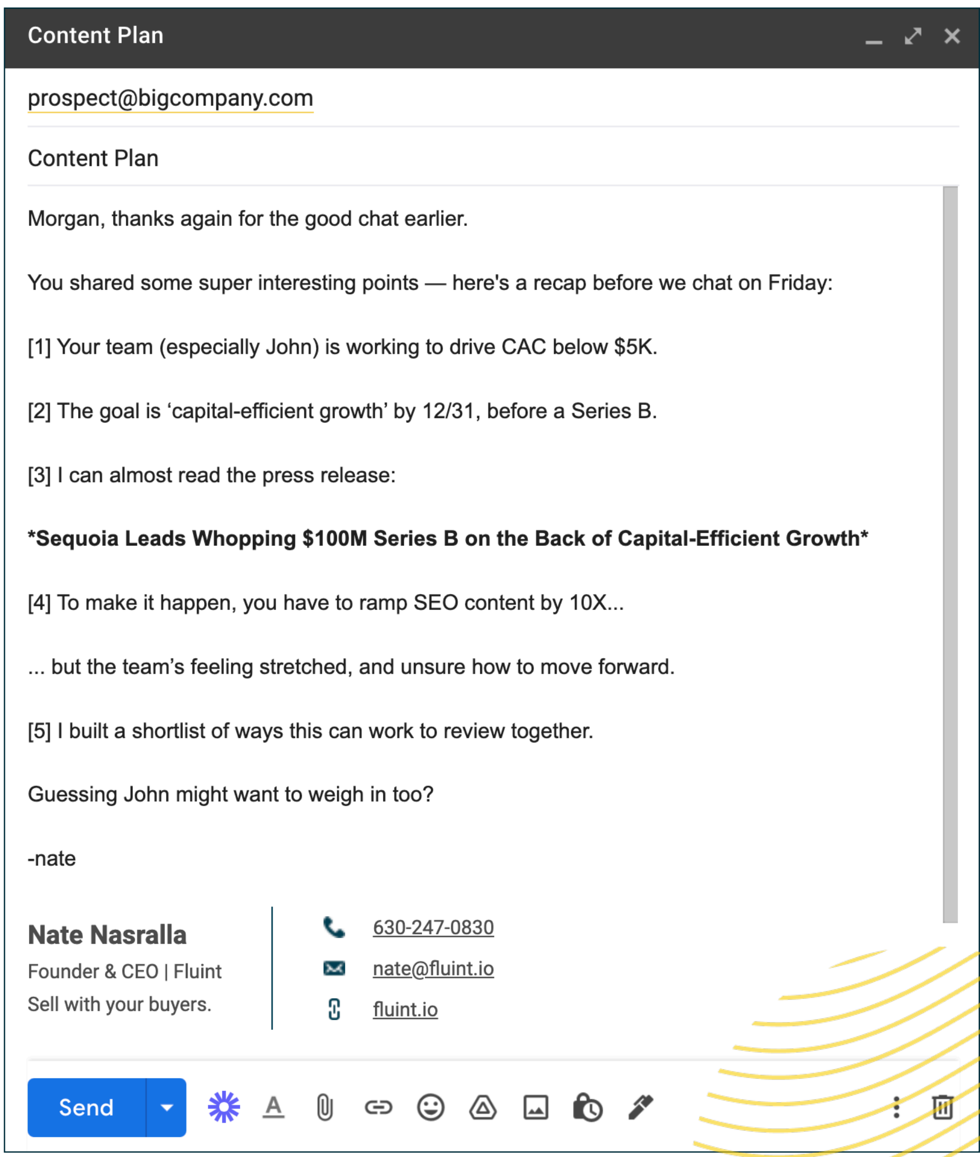
Here’s how to enable your deal champions with an email they can forward, to grab an Executive’s attention in just 100 words.

To start, here’s an example.

Suppose I sell software that generates SEO content to help marketing teams create and qualify more leads.

Here, I’m following up with my prospect, Morgan. She’s the Marketing Manager at a fast-growing startup, and reached out to see our keyword tool.

After doing my discovery and understanding her team’s goals, here’s what I’d write —>



Content Plan

prospect@bigcompany.com

Content Plan

Morgan, thanks again for the good chat earlier.

You shared some super interesting points — here's a recap before we chat on Friday:

[1] Your team (especially John) is working to drive CAC below $5K.

[2] The goal is ‘capital-efficient growth’ by 12/31, before a Series B.

[3] I can almost read the press release:

Sequoia Leads Whopping $100M Series B on the Back of Capital-Efficient Growth

[4] To make it happen, you have to ramp SEO content by 10X...

... but the team’s feeling stretched, and unsure how to move forward.

[5] I built a shortlist of ways this can work to review together.

Guessing John might want to weigh in too?

-nate

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Send

Let's break down this email into its framework, and unpack the principle behind each point.

Subject: Reads like an internal priority.

Hi < Name >,

[1] Open with a big, company-wide objective that affects everyone.

[2] Insert a trigger phrase that's familiar to your prospect's leadership.

[3] Use visual language to share the future and stir emotion.

[4] Build tension. Suggest this future might not happen.

[5] Align your ask with the decider's job.

- Rep's Name

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1. Execs and key employees think big. Really big.

Managers focus on content creation. CMO's think about CAC. Dig past the first problem.

2. Listen for 'trigger phrases'.

'Capital-efficient growth,' and 'by Dec 31.' This taps a narrative leaders are already sold on and repeat to their team.

3. Use visual language.

Help them step into a future you enable. What CMO doesn't want to have that headline written about them?

4. Build tension.

The leader's goal is at stake. There's a very real chance they won't see that headline.

5. Your request isn't for "time" or a "meeting."

You've built out something just for them, it needs feedback. This is what leaders do — they guide and direct their team.