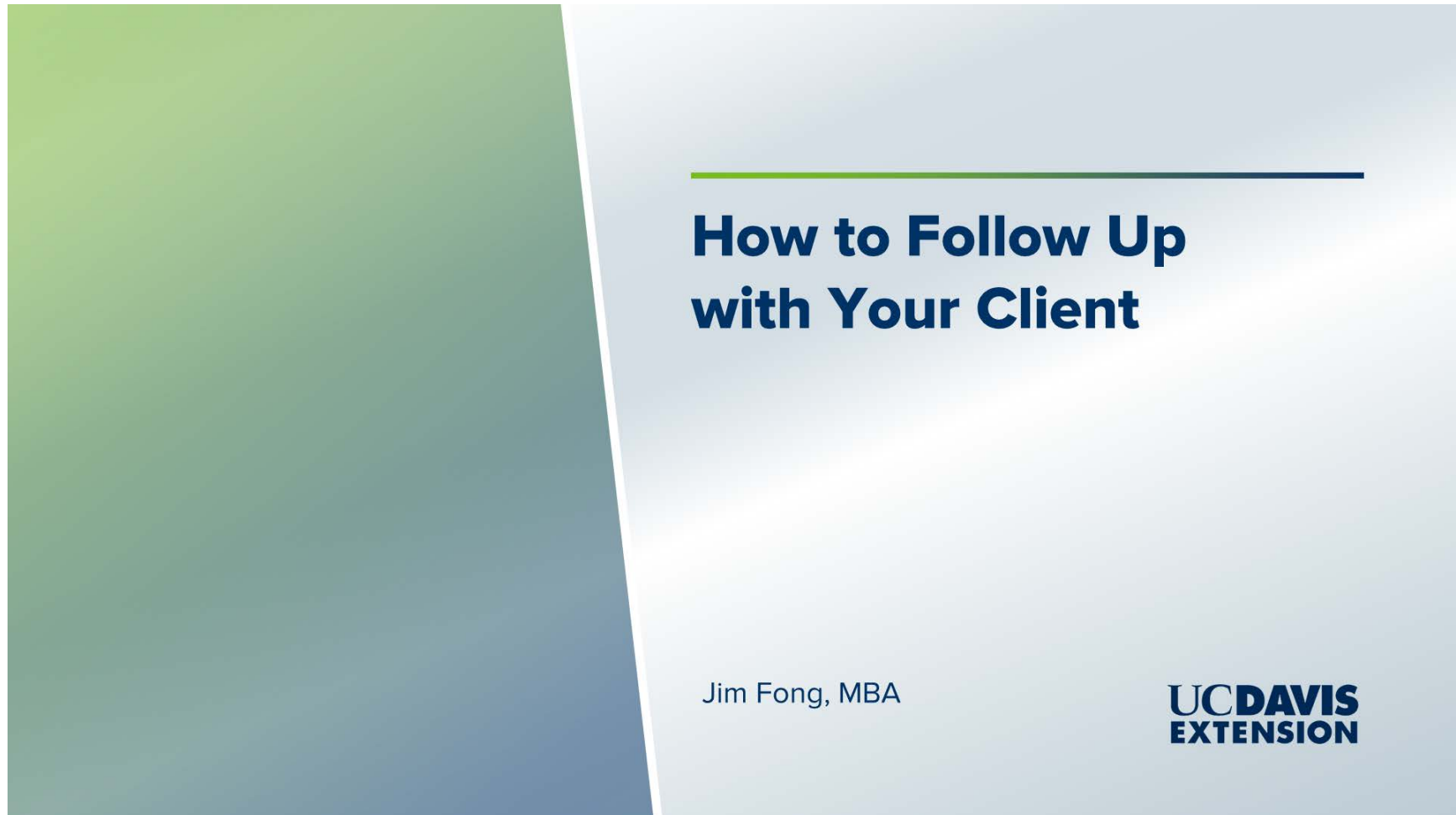


Lesson 4.6: How to Follow Up with Your Client

Slide 1: How to Follow Up with Your Client

The slide features a light blue background with a green-to-blue gradient on the left side. A horizontal line, colored green on the left and blue on the right, is positioned above the title. The title "How to Follow Up with Your Client" is written in a large, bold, dark blue font. Below the title, the name "Jim Fong, MBA" is displayed in a smaller, dark blue font. In the bottom right corner, the "UC DAVIS EXTENSION" logo is visible, with "UC DAVIS" in a larger, bold font and "EXTENSION" in a smaller font below it.

How to Follow Up with Your Client

Jim Fong, MBA

UC DAVIS
EXTENSION

Slide 2: Learning Objectives

Learning Objectives

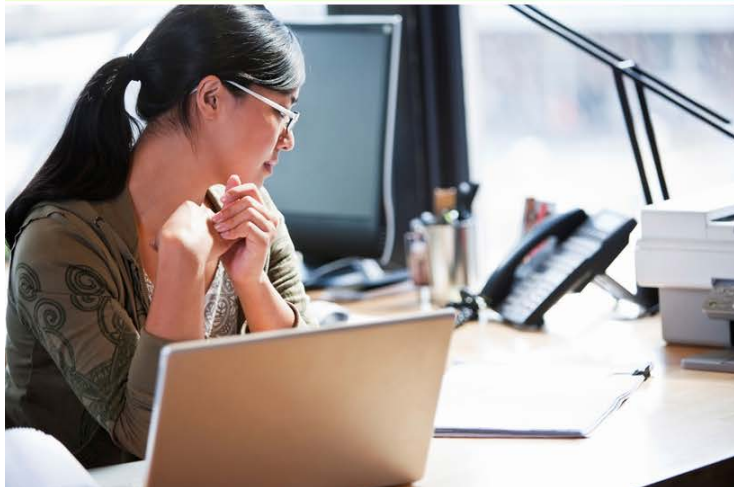
Think through your follow up strategies

Apply best practices for follow up

Strategize to build relationships for future

Slide 3: Why Market Researchers May Not Follow Up

Why Market Researchers May Not Follow Up



Researchers appear not
to be good at sales

Tend to be introverted

Often choose not to follow
up on proposals

Slide 4: Develop Follow Up Strategy

Develop Follow Up Strategy



Assess what is appropriate

Risky if you catch client
off guard

Slide 5: Passive Follow Up Techniques

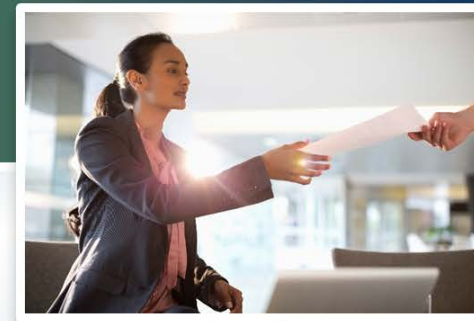
Passive Follow Up Techniques



Follow-up email



Written thank
you card



Additional
information,
samples, articles

Slide 6: Gain Points By Caring

Gain Points By Caring

Gain points for good
proposal and packaging

Gain more points for
showing you genuinely
care!



Slide 7: Three Potential Outcomes

Three Potential Outcomes

1

You win the project

2

You lose the project (Thank them for consideration.)

3

You never hear back

Slide 8: When You Don't Hear Back

When You Don't Hear Back



Ask for explanation of why you lost
50% will explain (and you'll learn)
Send simple follow up email

Slide 9: Make Efforts to Develop Client Relationships

Make Efforts to Develop Client Relationships

Newsletter or marketing
email list

Today's loss is potential
future win!

Stay connected and offer
to be a resource



Slide 10: Benefit of Building Ongoing Relationships

Benefit of Building Ongoing Relationships



Keep them informed
and thanked

Show that there are no
hard feelings

What you've invested can
give you an advantage on
the next project

Slide 11: Appropriate Follow Up Strategy

Appropriate Follow Up Strategy

Don't overstep or annoy

Add value

Improve future prospects