

MANAGER SOP: ENFORCING THE CALL → VOICEMAIL → TEXT FOLLOW-UP SYSTEM

How to ensure consistent follow-up execution without micromanaging, chasing reps, or relying on "good intentions."

SECTION 1 — PURPOSE OF THIS SOP

This SOP exists to ensure that every opportunity receives the same level of professional follow-up, regardless of salesperson personality, confidence, assumptions, or mood.

The goal is not activity for activity's sake. The goal is to:

- Increase response rates
- Surface real objections sooner
- Reduce ghosting
- Improve close rate accuracy
- Protect salesperson time
- Protect company margin

This system removes guesswork and replaces it with repeatable behavior.

SECTION 2 — THE NON-NEGOTIABLE RULE

Every follow-up attempt follows the same sequence:

1. Call
2. Voicemail (if not answered)
3. Immediate text message

This is a single motion, not three separate options.

Salespeople do not choose:

- Text instead of calling
- Skip voicemail because "they won't answer"
- Email instead
- Wait until later to text

If the customer does not answer the call, the voicemail is left, and the text is sent immediately.

SECTION 3 — WHY MANAGERS ENFORCE THIS (NOT SALESPEOPLE)

Managers enforce this because:

- Salespeople naturally avoid rejection
- Salespeople assume customers won't respond
- Salespeople substitute convenience for effectiveness
- Inconsistency hides real pipeline truth

The system exists to:

- Make follow-up observable
- Remove emotional decision-making
- Ensure the "baton" is clearly handed off
- Create fair performance comparison across reps

Managers do not debate whether the system "works." Managers enforce it because it makes results diagnosable.

SECTION 4 — WHAT COMPLIANCE LOOKS LIKE (CLEARLY DEFINED)

A follow-up attempt is considered compliant only when:

- A call is placed
- A voicemail is left if unanswered
- A text is sent immediately after the voicemail
- The action is logged in the CRM or tracking system the same day

Partial completion = non-compliance.

Intent does not matter. Effort does not matter. Only execution matters.

SECTION 5 — WHAT MANAGERS CHECK (WEEKLY)

Managers should spot-check:

- Call logs
- Voicemail timestamps
- Text message timestamps
- CRM notes that confirm sequence order

Managers are not required to listen to every voicemail or read every text.

The goal is to confirm:

- Sequence consistency
- Timing consistency
- Pattern consistency

Managers are not required to approve or review every follow-up attempt. This system is enforced through pattern spot-checks, not file-by-file permission.

SECTION 6 — HOW MANAGERS COACH NON-COMPLIANCE

First Miss (Private, Neutral)

"I noticed this follow-up skipped the voicemail. Walk me through what happened."

Then reinforce:

"The system isn't optional. We run the sequence every time so we can trust the data."

Repeated Misses (Pattern)

"This isn't about effort – it's about consistency. When the sequence isn't followed, we can't diagnose what's actually happening in your pipeline."

Important Boundary

Managers do not:

- Shame
- Lecture
- Debate effectiveness
- Accept excuses

They simply re-anchor to the system.

SECTION 7 — HOW THIS TIES TO KPI REVIEWS

This follow-up system directly supports:

- Lead effectiveness metrics
- Appointment conversion
- Measure-to-close ratios
- True close rate analysis

When the system is followed:

- Missed opportunities surface faster
- Objections become visible
- Coaching becomes specific
- Close rate discussions become factual, not emotional

When it is not followed:

- Numbers lie
- Coaching stalls
- Performance debates become subjective

SECTION 8 — MANAGER REMINDER (IMPORTANT)

Managers are not enforcing activity. They are enforcing clarity.

This SOP exists so:

- Salespeople don't carry uncertainty
- Managers don't chase updates
- Owners can trust the numbers

Consistency is not control. Consistency is freedom.

You don't enforce systems to control people.
You enforce systems to protect performance.

Created by Matt Shelton

Systems-built clarity for flooring businesses

Operator experience. Ethical execution. Practical results.

matt@mattshelton.co

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