- A SIMPLE SYSTEM FOR TRACKING -

LEADS & FOLLOW-UPS

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6-FIGURE BIZ ACADEMY

FOR NUTRITION PROFESSIONALS

The more you actions you take to gain exposure, the more and more people you're going to meet, many of whom could be ideal potential clients.

One of the **BIGGEST missed opportunities** is that most business owners keep very poor records of whom they've talked to, and whom they're supposed to check in with or follow-up with at a later time.

You see, **not everyone is going to be ready to work with you the first time you meet**, or the first time you do an enrollment session. I've had people finally choose to work with me over a year from the time we initially spoke, and I've had people who have turned down one program or package appear months later to sign-up for something else I was offering.

Keeping track of whom you've spoken to, what transpired, and when you might want to check-in with them again is absolutely imperative if you want to have a steady flow of clients. It's much easier to enroll someone you have a pre-existing relationship with than somebody brand new!

So, here's a simple system for tracking leads and follow-ups.

WHAT YOU'LL NEED:

- 2 Small Index Card Boxes (the kind people put recipes in)
- Index Cards to go inside them
- Tabs for January through December
- Tabs numbered 1 through 31
- Tabs labeled A to Z

HOW IT WORKS:

In Index Card Box #1, you'll put the tabs for January through December, and for the month you're currently IN, you'll put the tabs labeled 1 through 31 right after the tab for that particular month.

In Index Card Box #2, you'll put the tabs labeled A through Z.

Now, when you meet someone who could be a potential client – say at a conference or a networking event – **you're going to want to "create a card" for that person.** This means to take a blank index card and write down everything relevant – their name and contact info, how and when you met, what you discussed, why you think they could be a great candidate, and, most importantly, when you want to follow up with them.

(If they gave you a business card, staple their business card to the index card you're creating).

Then, based on when you want to follow-up, file the index card in the appropriate place in Index Card Box #1.

Let me explain:

Let's say that today is July 5th. So right now in Index Card Box #1, I have all of the sequential tabs for January through December, but behind the July tab, I have the tabs labeled 1 through 31 (which represent the days of the current month).

Now let's say I meet someone I've decided to follow up with in a week. Well, since today is the 5th, I would create their index card (with all of the relevant information about them) and I'd file it in July placed behind the tab for day "12" – which is one week from now.

However, if they asked me to follow up with them in 3 months – they were in the middle of a move, and October was going to be a much better time to discuss coaching – then I'd create their index card and file it right behind the October tab. (Note that because October isn't the current month, it does not have the tabs labeled 1-31 after it).

Then, when it finally got to October, I would take all of the cards filed under October (let's say I had 3 people to follow up with that month) and I'd put in the tabs for days 1 through 31, and then I'd take those 3 index cards and file each one on the specific day that I've decided to follow up with each person.

So cards will "move around" so to speak. For example, if I call someone and leave a message, I might move their index card up by 3 days as a reminder to call them again 3 days from now.

The overall "system" is to check Index Card Box #1 each day to see whom you have to follow up with that day. This way no one falls through the cracks!

SO WHAT IS INDEX CARD BOX #2 FOR?

Index Card Box #2 is **where you'll put the tabs labeled A through Z, and that's where you file cards for anyone that has become a paying client, or anyone that you've spoken to or had a enrollment conversation with that you're not actively following up with.**

For example, if someone turns down your high-end services after a Strategy Session, you might keep them in Box #2 so that you remember to reach out to them in the future when you create a different or less expensive program.

Remember to look through Box #2 semi-regularly just to be reminded of whom you've spoken to and to assess whether there's any reason to contact them again (you'll have the notes of exactly what transpired with each person on their card).

So that's it! I can't tell you how valuable this system has been for me – following up with people who would otherwise be "forgotten" has netted me tremendous revenue and allowed me to truly be of service to many who have needed my help!