FOLLOW-UP & TRACK —
CLOSE THE LOOP AND MULTIPLY YOUR WINS

SQUARE 1 GROUP

DEALS DON'T DIE BECAUSE PEOPLE SAY "NO."
THEY DIE BECAUSE YOU STOPPED FOLLOWING UP.

FOLLOW-UP & TRACK

INSTRUCTIONS:

You've mapped your flow, built your Triage Call, and nailed your Strategy Call.
Now comes the part that separates amateurs from closers — **the follow-up.**

This worksheet builds the system that recovers 20-30 % of "maybes." It's part automation, part accountability: a mix of emails, texts, and touches that turn silence into signed contracts.

By the end, you'll have:

- A 7-day follow-up sequence
- A tracking sheet for every open deal
- A simple rhythm you can delegate or automate

THE GUIDE:

STEP 1:

Define Your Follow-Up Goal

Fill in the blank:
The purpose of my follow-up system is to ___________.

Example: Re-engage leads who ghost after a Strategy Call and get a clear yes or no."

STEP 2:

Choose Your Follow-Up Window

Fill in the blank:
I'll follow up for ___ days after a call before moving someone to "cold."

Example: "14 days."

- Most deals close within the first 7-10 days of follow-up.

STEP 3:

Write Your Follow-Up Cadence

Use this base pattern (then customize it):

Day	Channel	Goal	Example
1	*Email*	*Quick recap*	*"Here's what we covered + next steps."*
3	*Text*	*Soft touch*	*"Just checking in — still thinking it over?"*
5	*Email*	*Value add*	*"Here's a client case study you'll relate to."*
7	*DM or Text*	*Direct question*	*"Want me to save your spot for this month?"*

Fill in the blank:
My primary follow-up channel will be ___________.

STEP 4:

Pre-Write Your Follow-Up Messages

Create 3 short templates:

1. **Friendly Check-In:** "Hey [name], wanted to see where your head's at after our call."
2. **Value Reminder:** "Sharing a quick win from a client who was in your exact spot last month."
3. **Last Call:** "Wrapping up my calendar for this week — want me to hold a spot?"

Fill in the blank:
I'll add personal touches like ___________.

Example: "Mention something specific they said on the call."

STEP 5:

Automate the First Touch

Fill in the blank:
I'll automate my first follow-up email via ___________.

Example: "GoHighLevel or HubSpot workflow."

- Immediate follow-ups triple response rates.

STEP 6:

Build Your Deal Tracker

Use a simple Google Sheet or CRM pipeline with these columns:
| Name | Stage | Last Touch | Next Touch | Status | Notes |

Fill in the blank:
I'll update this sheet every ___________.

Example: "Morning at 9 AM."

STEP 7:

Add Notifications or Reminders

Fill in the blank:
I'll get reminded to follow up via ___________.

Example: "Slack ping, Google Calendar, or CRM task."

- Automation is worthless if you forget to check it.

STEP 8:

Create a "No Response → Nurture" Rule

Fill in the blank:
After ___ days of no response, I'll move the lead to ___________.

Example: "30 days → Nurture List."

- Never delete — just downgrade and re-engage later.

STEP 9:

Review Your Metrics Weekly

Track:

1. Total Follow-Ups Sent
2. Replies Received
3. Calls Re-booked
4. Deals Closed

Fill in the blank:
My target follow-up close rate is ___________ %.

Example: "20 % of unclosed leads converted within 14 days."

STEP 10:

Refine Your System

After 2 weeks, review and answer:

Which message got the most responses? ___________
Which follow-up felt forced or spammy? ___________
What will I change next time? ___________

Why It's Important:

Most solopreneurs lose sales because they disappear after the call. Your pipeline isn't dead — it's just waiting to be followed up on. A clean system makes you look disciplined, confident, and trustworthy — and that alone closes deals.

**Need help setting up your automation or CRM tracker?
Book a free strategy session:**

square1grp.com/brainstormsession

You've now built the entire 2-Call Close System — from lead qualification to follow-up.

Next, we'll combine everything into The 2-Call Close Playbook so you can run it like a machine every week.