[Company name]

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Sales Follow-Up Plan

Following up a sales opportunity in planned steps instead of ad-hoc chasing: sequence, contact log, and close-out.

Document	Sales Follow-Up Plan
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

Opportunity details

Field	Entry
Salesperson	[Salesperson name]
Client company	[Client company]
Client contact	[Client contact]
Opportunity	[Opportunity name]
Follow-up start date	[Follow-up start date]
Target close date	[Target close date]
Value of opportunity	

Follow-up sequence

Step	Date	Method	Message / purpose
1	[Follow-up start date]	Email	Thank the contact and confirm next steps for [Opportunity name]
2		Phone call	Check questions on the proposal for [Client company]
3		Meeting	Agree the decision and the route to close by [Target close date]

[Company name]

Follow-up steps in order

1. Send the opening follow-up on [Follow-up start date], referencing [Opportunity name] by name.
2. Phone [Client contact] at [Client company] if no reply arrives within three working days.
3. Book a closing meeting before [Target close date] and confirm the decision maker will attend.
4. Record the outcome of every contact in the log below the same day.

Contact log

Date	Method	Contact	Outcome	Next step

Close-out

Outcome: [Follow-up outcome]
Closed date: [Close date]
Reason won or lost: [Reason won or lost]
Handover to delivery: [Handover decision]
Lessons noted: [Lessons noted]

Completion checklist

	The opportunity ([Opportunity name]) and target close date ([Target close date]) are named.
	Every step of the sequence has a method and a purpose tied to [Client company].
	The contact log is complete and the close-out records the won or lost reason.