# First Meeting Follow Up Tips & Examples:

The First Meeting is not complete until a follow up email is delivered. A great First Meeting can be completely tarnished by untimely follow up, no follow up or a poorly written (or overly verbose) follow up email. This guide is to help with some of the key objectives surrounding a First Meeting follow up presuming that you feel the company in question is a qualified prospect.\*

\*Qualified prospect is defined as a company that fits your geographic, demographic and psychographic criteria, but does NOT necessarily mean that there is an immediate opportunity.

### Key Points to remember when writing a First Meeting follow up email:

* Keep the email SHORT
* Send within 24 hours of the First Meeting (no later than 48 hours)
* Thank them again for their time helping you learn about THEM
* What are the 2 – 4 (at MOST) memorable/pertinent details discussed
* IF they described a pain point and/or quantified the impact of a problem – remind them that you heard them. A prospect needs to FEEL and BELIEVE that you understand their problems (and you really SHOULD understand them)
* Ask them for clarity if you missed anything important
* Clearly articulate the next steps, and timeline expectations that were discussed in the First Meeting\*\*

\*\*Since the First Meeting is about THEM, often the next step or the Second Meeting is to have them get to know YOU, and more about what YOU can do for them. Invite them to your office for the next step – show and tell, as well as qualifies their interest.

### Extremely Poor Follow up email example:

Prospect,

Thank you for meeting with me a couple weeks ago, I really enjoyed learning about your business.

We can offer managed services to support your team of 30 people and 2 servers – attached are a couple documents that describe our programs. We have a high quality backup solution, our team is really focused on customer service, and your organization is a good fit for us. For us to be able to move forward, we need to conduct an eval - let me know if you would like me to send over a quote.

Talk to you soon,

Sales Representative

### Notes about the poor email follow up:

* Timeliness: “a couple weeks ago”
* Focused on us vs. them: “We can offer…” “We have a high quality…” “Your organization is a good fit for US”
* Poor use of abbreviated word: “eval” – what is an eval?
* Poor use of the word “quote” – we deliver and present proposals, not quotes.
* Too early to discuss a ‘quote’ – this is like saying “I love you” on the first date, WAY TOO SOON!
* Did not articulate any pain that the prospect shared, did not summarize objectives the prospect may have stated
* Did NOT establish any next steps or actions

### Good follow up email example:

Prospect,

It was a pleasure meeting with you yesterday and learning about YOUR ORGANIZATION. I really appreciate your humility and openness to developing a partnership with a company like ours to help drive improvement in the IT systems that will support the continued growth of the company.

In our conversation, I heard several needs that you hope to address:

* Freeing up your time to work on higher-value, strategic projects. You said one of your biggest constraints preventing you from moving forward on high-value/impact projects is the 10 to 15 hours per week you spend doing day-to-day desktop support.
* You are concerned about your organizations ability to support growth without adding headcount due to excessive manual tasks and duplication of effort – in the finance department in particular.
* The risk of your aging infrastructure, and considering cloud options moving forward

Per our discussion, I would like to invite you to our office, where we can present and discuss some ideas that might be a good fit to address the objectives you are working to accomplish.

Here are a couple times that our team is available – let me know if any of these times work for you:

* Tuesday AM
* Wednesday PM
* All day Thursday

Please let me know if there is anything that I missed, and I look forward to digging in deeper to see if we are the right fit to be your technology partner.

Sales Representative

### Summary:

The follow up email helps you capture critical details while they are fresh in your mind. This enables you to demonstrate how the prospect should expect you to engage with them, this should demonstrate your ability to listen to them and define next actions. The prospect wants you to help guide them through the process, and your timely, accurate summary of the conversation is the first step in many trust building activities that will set you up for success to earn their business!