# Post First Meeting Checklist:

## Client Facing Actions:

* Send follow up email summary within 24 hours – see First Meeting Follow up Tips document.
* Call Prospect to confirm they received your follow up email. Initial emails may get caught in SPAM, especially if you sent an attachment or a link.
* Send hand written thank you note and mail within 24 hours (If ‘A’ or ‘B’ prospect).

## Critical Feedback to assist Marketing & Future Lead Generation Efforts:

* Complete “First Meeting Feedback Form” – see ConnectWise Today Sales Links

## ConnectWise Updates & Confirmation of Accurate Data

* Update and/or add contact information in ConnectWise if new information was shared and/or if additional people were in the meeting
* Update notes in Activity with the key points of the meeting and copy and paste summary email in notes for future reference.
  + Plan out next actions (note them in the SAME ‘Next Action’ activity) for A, B, or C prospects and update notes in Activity
  + ‘Close and follow up’ and schedule next steps
* Create or Update Opportunity
  + Check the correct ‘Campaign’ is applied
  + Check that your ‘Activity’ is associated correctly
* Enter mileage expense on Activity if applicable
* Add contacts to marketing communication groups via ConnectWise Track (if A, B, or C prospect candidate)
  + “Add Contact to CO Marketing Groups” or “Add Contact to MN Marketing Groups” or the respective location.