MESSAGING & FOLLOW-UP

Sales Follow-Up Cadence Review

Fixed price: $119 **Format: 5-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Redwood Home Remodeling, a fictional residential remodeling company, is used to demonstrate how this service is delivered. Assess timing, spacing, channel mix, and stop rules across active sales opportunities.

Primary risk

Follow-up drops sharply after the first week

Best next move

Adopt one baseline cadence through Day 21 with defined stop rules.

Evidence reviewed

Current cadence; touch timestamps; channels; stop rules; outcome data; sample messages.

What this report does

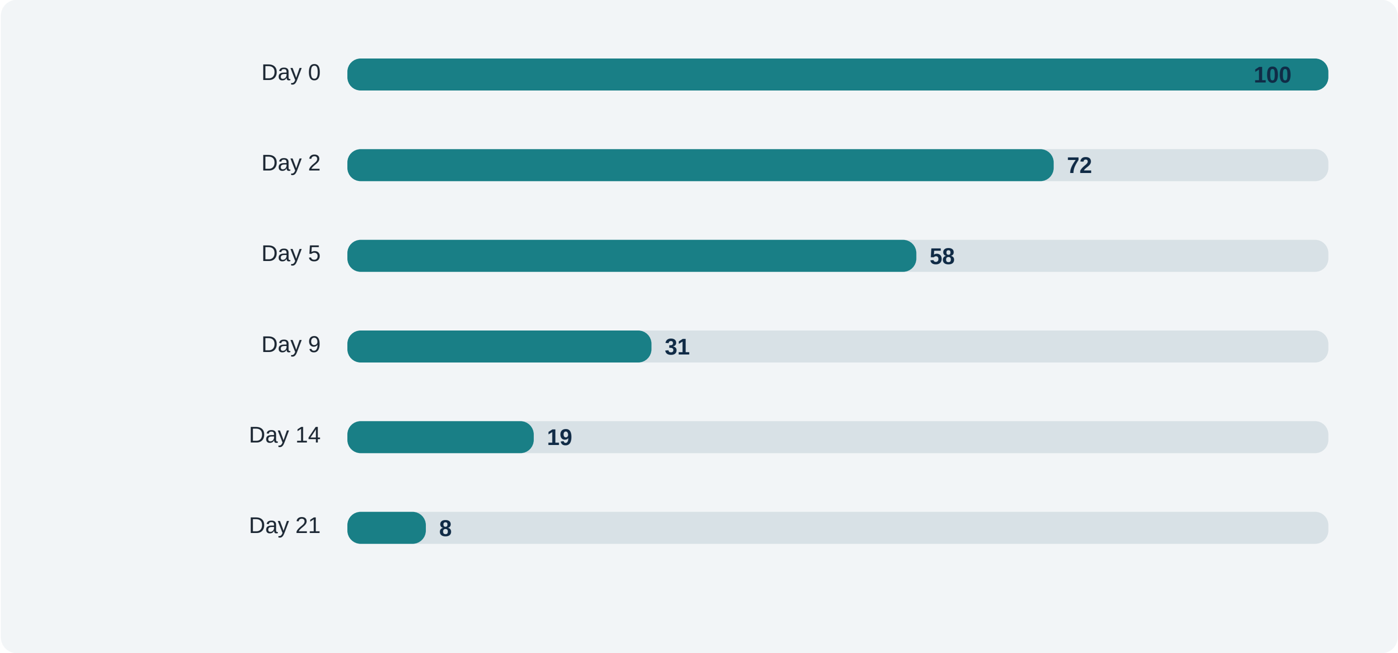
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

SERVICE-SPECIFIC ANALYSIS

Current-state review

The sample analysis below uses synthetic records to show the type of evidence this service would evaluate for a real client. The numbers are illustrative, not benchmarks.

Illustrative operating data



Interpretation

Most active proposals receive no structured touch after Day 9. Some reps stop after two attempts while others continue indefinitely. Phone, text, and email are used based on preference rather than plan.

PRIORITY FINDINGS

What deserves attention first

Priority reflects operational risk and controllability, not a claim about financial impact.

HIGH — **Follow-up drops sharply after the first week**

Most active proposals receive no structured touch after Day 9.

HIGH — **Cadence varies by rep rather than opportunity type**

Some reps stop after two attempts while others continue indefinitely.

MEDIUM — **Channels are not intentionally sequenced**

Phone, text, and email are used based on preference rather than plan.

Control implication

The immediate objective is not to add complexity. It is to make the smallest number of controls visible, owned, and repeatable enough that the process can be managed consistently.

RECOMMENDED ACTIONS

30-day implementation rhythm

The sequence below is intentionally limited. Complete the control work in order, confirm adoption, and only then expand the process.

0-7 days	Adopt one baseline cadence through Day 21 with defined stop rules.	Owner / manager
8-21 days	Allow variation only when the opportunity has a documented reason.	Process owner
22-30 days	Assign each touch a purpose and channel instead of repeating the same message.	Manager review

Operating rules

- Assign one accountable owner for each action.
- Use a dated next action or review date.
- Measure only fields the team can maintain consistently.
- Do not add software or process complexity unless the current controls are actually being used.

NEXT-STEP ROADMAP

What to maintain, what to revisit

MAINTAIN	Keep the controls that are already producing reliable visibility. Do not change a working control simply to make the process look more sophisticated.
REVISIT	Review the high-priority finding after 30 days with the same evidence definition used in this report.
STOP / CLOSE	If the control is stable and the underlying question is answered, no additional paid service is required.
ESCALATE ONLY IF EVIDENCE SUPPORTS IT	A different service is appropriate only when a separate operational problem becomes visible outside this report's scope.

Limitations

This sample is illustrative. A real report would use only client-supplied or client-approved evidence, state any missing fields, and avoid unsupported conclusions.