

New Client Time Line Follow Up Worksheet

Follow Up Action Step	Time Frame	Completed	Notes
Client signs paperwork			
Phone call/ email - any other questions & to do items	24 Hrs		
Send Thank you card via postal service	48 Hrs		
Status report	1 week later		
Checking in call & email if left a message	1 month later		
Checking in call & email if left a message	3 months		
Review /check in	6 months		
Review /check in	9 months		
Review	1 year		
Other touches			
Client appreciation events with opportunity to bring a friend or colleauge (possible referral)			
Newsletter/Blog - Revelant tips and hints of value			
Birthday			
Valentine's Day			
St. Patrick's Day			
Spring/Easter			
Fourth of July			
Back to School/Fall			
Halloween			
Thanksgiving			
Winter/Holiday's			
Anniversary's			
Misc/Other			



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