

FREE RESOURCE

Prospect Follow-Up Checklist

The weekly discipline that keeps no prospect from slipping through the cracks.

The operating rule

Every prospect has a defined status, an owner, and a next action with a date. If any of the three is missing, the prospect is at risk.

Follow-up cadence

- **First 24 hours:** personal outreach after first contact — call beats email.
- **Day 3:** value touch — something useful, not "just checking in."
- **Day 7:** second attempt on a different channel.
- **Day 14:** direct question — "Is this still a priority for you?"
- **Day 30:** move to long-term nurture or close out. No prospect sits in limbo.

Checklist — run weekly

- ☐ Every open prospect has a next action with a date.
- ☐ No prospect has gone 7+ days without contact.
- ☐ Stalled prospects (30+ days, no response) are moved to nurture or closed.
- ☐ Each prospect record shows source, interest level, and decision timeline.
- ☐ The team knows who owns each prospect — no shared "we'll get to it."
- ☐ Follow-up templates exist for each stage so outreach stays consistent.

Want this built into your practice?

Book a free practice operations assessment at ajghosh.com