LEGACY PARTNERS

Conversations Create Opportunities.

YOU SHARED THE OPPORTUNITY... NOW WHAT?

THE **FORTUNE** IS IN THE **FOLLOW UP.**

Every conversation ends with an appointment. Always give two choices: ***"Is Tuesday at 7 or Thursday at noon better?"***

What did they SAY?

YES!

Awesome! Enroll them right now.

Walk them through enrollment together on the spot, then book their first training.

Can't enroll right now? Book the enrollment appointment with two choices:

> *"Is tonight at 7 or tomorrow at noon better?"*

PEOPLE CHANGE LIVES.

NOT YET

Go to **So what DID they say?** below ↓

NO

Was it a real no?

Or was it "I need to think," "send me info," "I'm busy" or no reply?

NOT REALLY

Find their answer below.

Every answer gets a next appointment. ↓

NEVER ASK AGAIN

Respect that.

Leave them alone and stay friendly. You never know what tomorrow brings.

NOT RIGHT NOW

Set a check-in date.

Ask permission, then put it on your calendar.

> *"Okay if I check back in a few months?"*

So what DID they say?

"I need to think about it."

DO THIS FIRST

Book a time to talk it through.

Set it before you hang up.

> *"When can I call with any questions? Tomorrow at 6 or Thursday at noon?"*

Did you set a time?

- **YES** — **Calendar it.** Confirm by text and call right on time.
- **NO** — **Offer two specific times.** Make it an easy choice.

"Send me some information."

DO THIS FIRST

Book the follow-up, then send it.

Set a time to talk right after they look.

> *"When will you have 15 minutes to look at it? Let's talk right after. Tomorrow at 7?"*

Did you set a time?

- **YES** — **Send it now.** Confirm the time and call on schedule.
- **NO** — **Hold the info.** Offer two times, then send it.

"I'm really busy right now."

DO THIS FIRST

Respect their time. Book the next one.

Keep it short.

> *"What does your week look like? Tuesday evening or Saturday morning?"*

Did they give you a time?

- **YES** — **Calendar it.** Confirm by text and call right on time.
- **NO** — **Pick a date to reconnect** when things slow down.

They ghosted me!

DO THIS FIRST

Reach out with a time to talk.

Friendly and low pressure.

> *"I know life gets busy! 10 minutes Thursday at 6 or Friday at noon?"*

Did they reply with a time?

- **YES** — **Lock it in.** Confirm by text and call on time.
- **NO** — **Try a new approach.** Share something valuable and offer two new times.

FOLLOW UP!

BE HELPFUL. BE HUMAN. DON'T BE WEIRD.

- CONSISTENT FOLLOW UP CREATES RESULTS.
- EVERY CONVERSATION ENDS WITH AN APPOINTMENT.
- TIMING CHANGES. A NO TODAY COULD BE A YES LATER.
- YOU'RE MAKING A DIFFERENCE. KEEP SHOWING UP!