Ashford Business Services Ltd

Sales Follow-Up Plan

Following up a sales opportunity in planned steps instead of ad-hoc chasing: sequence, contact log, and close-out.

Document: Sales Follow-Up Plan **Version:** 1.0

Prepared by: _____ **Owner:** _____

Date: _____ **Review date:** _____

Opportunity details: Salesperson: _____ **Client company:** _____

Client contact: _____ **Opportunity:** _____

Follow-up start date: _____ **Target close date:** _____

Value of opportunity: _____ **Follow-up sequence:**

Step	Date	Method	Message / purpose
1	9 November 2026	Email	Thank the contact and confirm next steps for Sarah Mitchell
2		Phone call	Check questions on the proposal for Harborne Retail Group Ltd
3		Meeting	Agree the decision and the route to close by 9 November 2026

Follow-up steps in order 1. Send the opening follow-up on 9 November 2026, referencing Sarah Mitchell by name. 2. Phone Client contact at Harborne Retail Group Ltd if no reply arrives within three working days.

3. Book a closing meeting before 9 November 2026 and confirm the decision maker will attend. 4. Record the outcome of every contact in the log below the same day.

Contact log:

Date	Method	Contact	Outcome	Next step

Close-out Outcome: Follow-up outcome as agreed at the meeting. Closed date: 9 November 2026

Reason won or lost: Reason won or lost as agreed at the meeting. Handover to delivery: Handover decision as agreed at the meeting. Lessons noted: Lessons noted as agreed at the meeting.

Completion checklist: The opportunity (Sarah Mitchell) and target close date (9 November 2026) are named.

Every step of the sequence has a method and a purpose tied to Harborne Retail Group Ltd.

The contact log is complete and the close-out records the won or lost reason.