

# Follow-up calls

## A few things to consider before making your follow-up

A successful follow-up call can be one of the most important parts of your campaign. In fact, a call soon after your letter or email could actually increase your response rate by 27.5%\*.

So, in order to help make your call more effective, we have listed a few hints and tips below:

### Before

Ensure your customers have not 'opted-out' of being contacted. And, here are some items to have at hand before you call:

- Customer's information (contact details, policies, etc...) from your database
- A copy of the letter or email you sent to them – ensure you know which product(s) you wrote to them about
- Your 'objection handling' sales aid.

### During

When making the call, remember to:

- Ask to speak to the person you addressed the communication to
- Check you are speaking to the right person, introduce yourself and explain the reason for your call
- Check they have received the information you sent:
  - If they have, ask if they've read it and recap what it was about
  - If they haven't, offer to
    - resend the information and agree to call back on a specific day (and check you've got their correct address details)
    - relate the key points of the communication over the phone then and there.
- Ask if they would be interested in having a quote – emphasise that it will only take two minutes to tell them the monthly premium
- If needed, refer to your objection handling sales aid.

When ending the call make sure to agree the next steps:

- Quote to be sent? When?
- Meeting to discuss quotation? When? Where?
- Try to get agreement for you to keep in touch in the future.

### After

Ensure you capture the details of the conversation:

- Note any actions that need to be taken and update any information i.e. preferred time to be contacted or renewal dates, on your database
- It's also important to note any additional information – like how receptive the customer was to being contacted or any issues they may have had.

Remember, it is your responsibility to ensure that you meet your regulatory obligations.

