SALESX

THE FOLLOW-UP EXECUTION GAP

Why sales teams keep contacting prospects without moving them closer to a decision.

THE PROBLEM IS NOT ALWAYS A LACK OF FOLLOW-UP.

A rep can make every scheduled call and still accomplish nothing. The difference is whether each conversation identifies, resolves, or advances something that matters to the buying decision.

1 Same prospect. Two approaches.

THE SCENARIO

A couple is considering a backyard pool. One partner is excited; the other worries they may not use it enough to justify the investment. They leave the appointment undecided.

UNSTRUCTURED FOLLOW-UP

Day 3: “Just checking in. Have you decided?”

Customer: “Still thinking.”

Rep: “No problem. I’ll call next week.”

Day 10: Same question. Same answer.

STRUCTURED FOLLOW-UP

At the appointment: Clarifies what would make the investment feel worthwhile.

Next contact: Revisits that specific concern and explores what has changed.

Outcome: Identifies a meaningful next step.

Core distinction: Unstructured follow-up repeats contact. Structured follow-up creates measurable progress.

2 What progress actually sounds like

The goal is not to pressure the customer into buying. It is to understand the unresolved decision and help them evaluate it.

01 BEFORE LEAVING THE APPOINTMENT

“It sounds like the concern is whether you would use the pool enough to feel good about the investment. Is that accurate?”

Purpose: Confirm the real obstacle instead of accepting “we need to think” as a complete diagnosis.

02 FIRST FOLLOW-UP

“You mentioned wanting to picture how often the family would use it. Did you two get a chance to talk through what a typical summer might look like?”

Purpose: Reopen the actual decision issue. Listen for new information rather than immediately presenting another pitch.

03 IF THE CUSTOMER IS STILL UNSURE

“What part still feels uncertain: how often you would use it, the total cost, or something else?”

Purpose: Separate the remaining concern from a polite delay. Do not assume the original objection is still the only one.

04 IF THEY NEED MORE TIME

“That makes sense. What would be useful to have figured out before we reconnect?”

Purpose: Agree on a specific next action and timing; record who owns it.

05 IF THEY DO NOT ANSWER

Leave one concise, relevant message; log the attempt and next planned action.

Purpose: Use a reasonable cadence for unanswered outreach. Once they respond, adapt to the new information and any agreed timing.

THE RULE: EVERY CONTACT NEEDS A REASON, AN OUTCOME, AND A NEXT ACTION.

3 Audit the pipeline, not just activity

Ask five reps to pull up two recent undecided opportunities each. For every opportunity, award one point for each item that the rep can substantiate in the CRM or conversation notes.

- ☐ **Real obstacle**
  The specific issue preventing a decision is known.
- ☐ **Decision process**
  Key decision-makers and their concerns are identified.
- ☐ **Last outcome**
  The rep can explain what changed in the last interaction.
- ☐ **Next action**
  There is a concrete action that could advance the decision.
- ☐ **Ownership + timing**
  The next action has an owner and a realistic date.

SCORING

10 opportunities × 5 criteria = 50 possible points. Review missing evidence by category; do not treat this diagnostic as a validated benchmark.

QUICK CRM QUALITY CHECK

Vague: “Called. Still thinking. Follow up next week.”
Useful: “Both want pool; one partner unsure about usage. They will map expected summer use by Thursday. Rep to call Friday to discuss remaining concern.”

WHAT DID YOUR TEAM’S PIPELINE REVEAL?

If the gaps are widespread, the issue may be training, CRM discipline, management coaching, or all three. A short audit can help identify where the process is breaking down.

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