

M^o Client Follow-Up Checklist

Date

After First and Subsequent Appointments

- Send invoice / receipt. _____
- Send thank you email with appointment reminder, reference material needed, etc. _____
- Set Reminder:** Contact client on _____ which is ___ days before next appointment. _____

After Final Appointment

- Send invoice / receipt. _____
- Send final follow-up email. _____
- Set Reminder:** Contact client if no response to follow-up email by _____.

Customer Relationship Management

- Recorded interactions in customer relationship management (CRM) system. _____
- Thanked client for providing feedback. Yes. No. _____
- Responded to client's online review. Yes. No. _____
- Acknowledged client on newsletter list. Yes. No. N/A. _____
- Acknowledged client on social media sites. Yes. No. N/A.
 - Facebook
 - Twitter
 - LinkedIn
 - Instagram
 - Other _____
- Set repeating reminder (monthly / quarterly / annually) to reach out to client about:
 - Articles of personal interest: _____
 - Business related articles: _____
 - New products related to their organizing challenges: _____
 - My latest promotions and specials
 - Birthday / anniversary / special occasion
 - Other _____

Feedback Integration

- Collected client feedback + reviews into one document. _____
- Discussed feedback with team. _____
- Made plan to incorporate feedback into business systems and operations. _____