

Follow-Up That Doesn't Rely on Memory

A repeatable process for managing open commitments, keeping the next step clear, and improving what keeps getting stuck.

MAKE THE COMMITMENT VISIBLE • GIVE IT AN OWNER • ALWAYS KNOW WHAT HAPPENS NEXT

THE REPEATABLE PROCESS

1 FIND OR CAPTURE

Start with the customer promise, open item, or opportunity. Use the reports, tasks, reminders, notes, email, and text tools already available in your DMS, ERP, point-of-sale, or CRM.

2 CLARIFY THE STATUS

Record what is outstanding, where it stands now, what you are waiting on, and whether the customer is waiting on you.

3 PUT IT UNDER CONTROL

Every active item needs a clear status, one owner, one next action, and a review date. Keep any promised or expected date visible too — that date is not the same as the review date.

4 COMMUNICATE

Use the right channel, document the contact, and tell the customer when they will hear from you again. A no-change update is still a useful update.

5 REVIEW THE EXCEPTIONS

Use the huddle to focus on what needs attention — not to read every open item. Bring forward the items that need action, a check, communication, a decision, or help.

6 CLOSE THE LOOP

When the item is finished, record the outcome and remove it from the active list: sold, resolved, picked up, authorized, declined, postponed, lost, or no further action.

7 LEARN AND IMPROVE

Weekly, look for repeat patterns. If the same follow-up problem keeps appearing, improve the process that is creating it.

USE WHAT YOU ALREADY HAVE

Most systems already include tasks, reminders, customer notes, email or text tools, saved views, and scheduled reports.

Start there before building another list.

WHERE TO START

- Open Sales Orders
- Open Quotes
- Open Work Orders
- Awaiting Authorization
- Completed Work / Not Picked Up
- Parts Received / Not Picked Up
- Special Orders / Backorders
- Open Warranty Claims
- Customer Tasks / Activities
- AR Aging / Account Issues

OPEN DOES NOT ALWAYS MEAN ATTENTION TODAY

10-MINUTE FOLLOW-UP HUDDLE

1. Who is waiting on us?
2. What is overdue?
3. What hasn't moved?
4. Who needs help?
5. What can we close?