

THE NEVER-LOSE-A-LEAD TOOLKIT

Part 1: Follow-Up Message Templates

Four ready-to-send messages that keep a lead warm from first contact to final check-in, without ever sounding pushy.

1. First Follow-Up — Day 1

Sent the day after initial contact.

Good afternoon [Name], thank you for reaching out about [service/property/product]. I wanted to personally follow up, there are a few details specific to your situation that could make a real difference in how this turns out for you. Happy to walk you through them whenever works for you.

2. Second Follow-Up — Day 3–4

Sent if there has been no response.

Good afternoon [Name], I know things get busy, so I wanted to check back in before this slips off your radar. [Service/property] is moving quickly on our end, and I'd hate for you to miss the right window if this is still something you're considering.

3. Value-Add Follow-Up — Day 7

Sent if there has still been no response.

Good afternoon [Name], I came across something most people in your position don't realize until it's too late: [insert relevant tip/resource/insight]. Wanted to make sure you had it. Happy to unpack how it applies to your specific case whenever you're ready.

4. Final Follow-Up — Day 14

Final message in the sequence.

Good afternoon [Name], this will be my last check-in for now, I don't want to overwhelm you. If the timing isn't right, no problem at all, but I didn't want you to miss out without at least having the full picture first. Please reach out whenever you're ready, the door's always open.

Part 2: Pipeline Tracker

Pair these templates with the accompanying Excel Pipeline Tracker to log every lead, follow-up date, and status at a glance.