

Thank you for downloading this brochure for our Client Follow-Up Schedule. Take a look below to see what this software offers you.

The Client Follow-Up Schedule gives you the following advantages:

Allows you to keep track of your client 'follow-ups'

Track when last you followed up with a client

Establish when your next follow-up is due

Track your monthly follow-up commitment

Assign a follow-up period for each client, between 1 month and 10 years

See the category breakdown of all of your clients

Monitor missed follow-ups

And more.. Take a look below for more details

Firstly, you can make sure that your name and company name are correct. You can then name up to 5 categories that you wish to use, these 5 categories are very useful, as they will separate your statistics. Your clients can later be categorised, and these will be the available categories. You can also capture bank holiday dates for the current year, this will then warn you if a follow-up date falls on a bank holiday.

Categories
Category 1
Category 2
Category 3
Category 4
Category 5

You will be given the option to select a client/job number or name in order to sort and select respective data. If each of your clients/jobs have a unique number of code, then please select 'Client Code', otherwise it would be best to choose 'Client Name'.

Select By:	Client Code
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Bank Holidays			

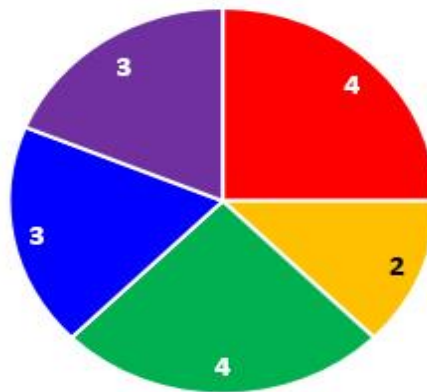
You can then capture your client data, not everything is shown here, but this data includes what is below. Select the category (from the list of what you captured before), then the follow-up frequency and the initial contact date.

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Richard Sumner

Category	Frequency (Mths)	Initial Date	Last Follow-Up	Next Follow-Up
Category 4	6	Thu, 09 Apr 2015		Fri, 09 Oct 2015
Category 1	6	Mon, 27 Apr 2015		Tue, 27 Oct 2015
Category 1	6	Thu, 04 Dec 2014	Thu, 04 Jun 2015	Fri, 04 Dec 2015
Category 1	12	Thu, 18 Dec 2014		Fri, 18 Dec 2015
Category 1	6	Fri, 02 Jan 2015	Thu, 02 Jul 2015	Fri, 01 Jan 2016
Category 2	6	Sat, 11 Jul 2015		Mon, 11 Jan 2016
Category 3	6	Fri, 10 Jul 2015		Mon, 11 Jan 2016
Category 5	6	Thu, 30 Jul 2015		Fri, 29 Jan 2016
Category 3	6	Fri, 31 Jul 2015		Mon, 01 Feb 2016

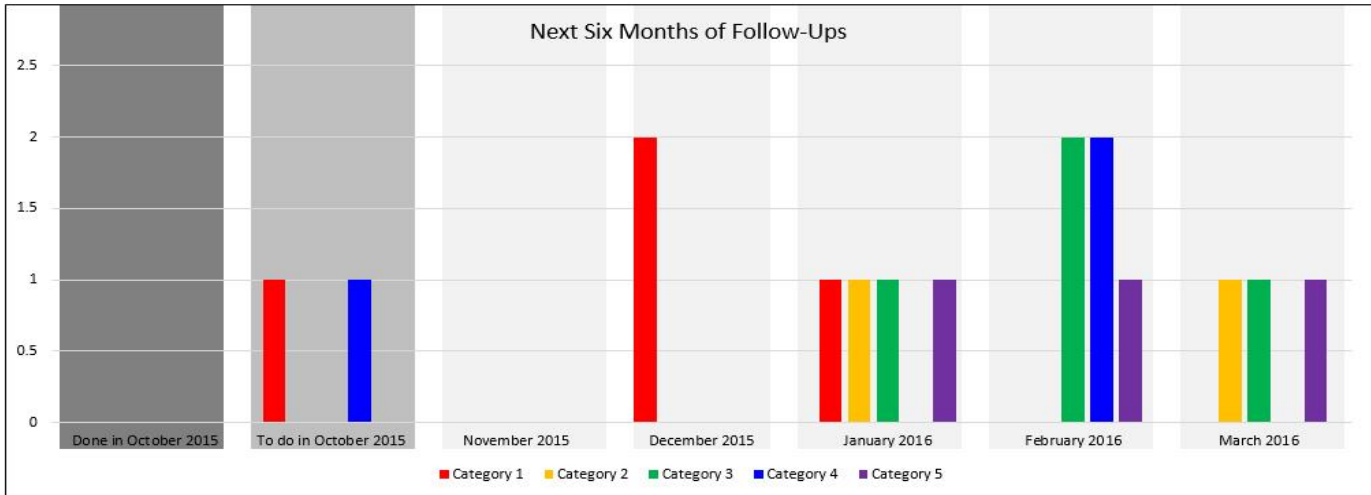
You will then have the next follow up date recommended to you when you click on the cell. You can over-ride the recommended date if you wish, and it won't fall on a Saturday or Sunday. Saturdays will change to the Friday and Sundays to the Monday.

When you follow up, put the date into the last follow-up column, and then select the next recommended date. It is that simple. The following data will then automatically update as you update your database! Starting with the breakdown of job types.



You are then supplied with a chart showing the next 6 months of follow-ups. This will show you the breakdown of follow-ups for the next 6 months and what categories they are in. This will no doubt help you to plan what you need to do in the next few months, as well as give you an indication as to which of your category types are more popular.

Here is the 6 month preview graph.



Not only can you see that, but you can also see some general statistics like how many follow-ups you have done this month and how many you still have to do, in each category. You can also see what percentage each category makes up, and what the average follow-up period is for each category. Now you can see why it was important to pick your categories carefully.

Categories	Total	Done During October 2015	Still to Do During October 2015	% of Total	Average Frequency - Months
Category 1	4	0	1	25.0%	7.5
Category 2	2	0	0	12.5%	7.5
Category 3	4	0	0	25.0%	7.5
Category 4	3	0	1	18.8%	7.5
Category 5	3	0	0	18.8%	7.5

Lastly, there is a sheet with a list of follow-ups required, on a monthly basis. Select the month (up to six months from the current month), and see all of the follow-ups due each month. If a follow up is due every month, it will appear on all of the lists. This list is handy to be printed out in order to follow up with the clients, just remember to update the last follow-up dates.

Follow-Up List for October 2015

<i>Company Name:</i>	<i>Individual's Name:</i>
Spreadsheet Solutions	Richard Sumner
Select Month to View	October 2015

Client Code	Client Name	Job Description	Contact Number	Contact Email	Category	Follow Up Date
9	Client 9	Job Description 9	0208 123 4575	test@email1.com	Category 4	Fri, 09 Oct 2015
11	Client 11	Job Description 11	0208 123 4577	test@email2.com	Category 1	Tue, 27 Oct 2015

So there you have it, how useful is this going to be to you and your business? If you wish to get more information, please follow the links below, and remember if you want something custom made for your needs, we do that too!

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