LinkedIn Follow Up Schedule

An excel based solution, which is macro free, to enable you to keep on top of your LinkedIn message prospecting. If this sounds like what you need, take a look at the details below.

Log all your LinkedIn prospects in one place

See each one change colour as tasks become due

You set the time required for each stage

Reminders to follow up on 'no replies'

You set the potential results, and assign each lead

Easily categorise leads in your own categories

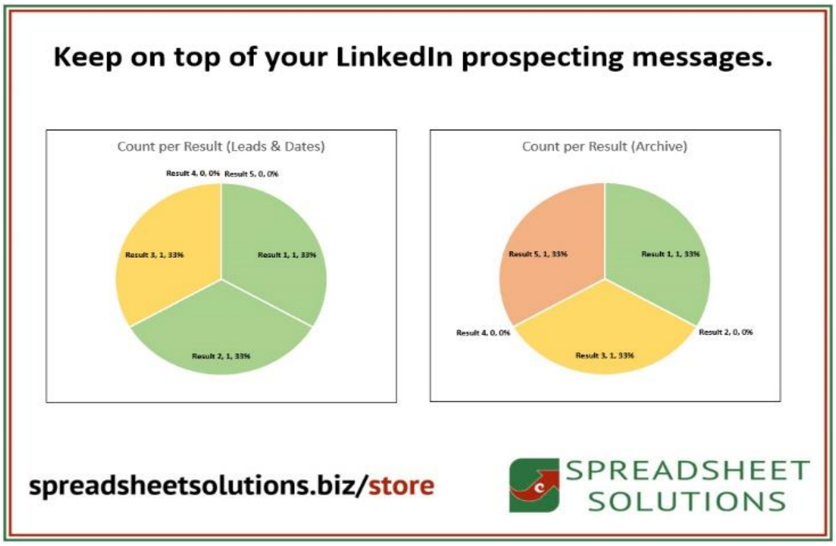
See an up to date 'to do list' with ordered tasks

Fully automated, up to date report

Archive old completed leads

Monitor time taken per stage

And so much more...



Scroll down to see more about this product

		Initial Message			2nd Message			Final Stage				
Lead Name	Select Category	Initial Message	No Reply Message	Received Reply	2nd Message	No Reply Message	Received Reply	Call Requested	No Reply Message	Date of Result	Select Result	Notes
Lead 1	Cat 1	01/01/2021		03/01/2021	04/01/2021	08/01/2021	09/01/2021	11/01/2021		13/01/2021	Result 1	
Lead 2	Cat 2	01/01/2021	05/01/2021	06/01/2021	07/01/2021		10/01/2021	11/01/2021	19/01/2021			
Lead 3	Cat 3	02/01/2021		03/01/2021						03/01/2021	Result 2	
Lead 4	Cat 4	01/01/2021	19/01/2021									
Lead 5	Cat 5	01/01/2021		04/01/2021	05/01/2021		07/01/2021	09/01/2021		12/01/2021	Result 3	
Lead 6	Cat 1	25/01/2021		25/01/2021								

Categories
Cat 1
Cat 2
Cat 3
Cat 4
Cat 5

Result	Colour
Result 1	Green
Result 2	Green
Result 3	Yellow
Result 4	Red
Result 5	Red

Enter up to 10 categories and results (no duplicates in each list). The categories can be whatever you wish (to separate on the report) and the results should be the 'final standing' possibilities for each lead. Please also select the colour for each. Green for positive results, yellow for neutral, and red for negative results.

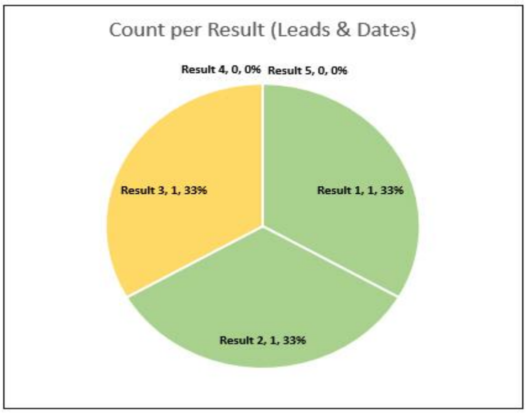
Including weekends

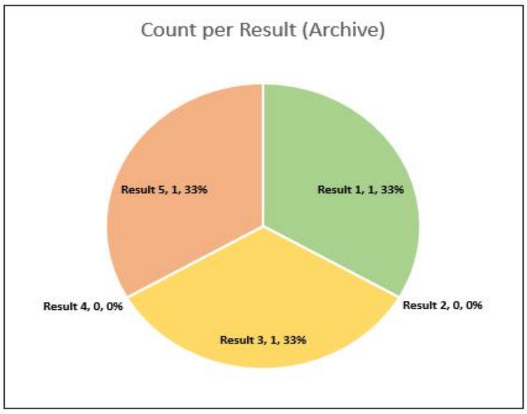
From Stage	To Stage	Days
Initial Message	Initial No Reply	5
Initial No Reply	Initial Reply	5
Initial Reply	2nd Message	5
2nd Message	2nd No Reply	5
2nd No Reply	2nd Reply	5
2nd Reply	Call Requested	5
Call Requested	Call No Reply	5
Call No Reply	Final Decision	5

Including weekends

Number of days for alert before due	1

The main purpose of this spreadsheet is to have one place where you can list all of your LinkedIn prospects and monitor when each touch point happened, and where you are in the process. As you can see above, each line has an assigned colour. These colours depend on whether the lead is active or complete, whether it is on track, due, or overdue, and what result was achieved (if complete). These colours change automatically as you reach dates, and enter data. All you need to do is enter the date as you reach each stage.
You can also set the time periods for each stage, as well as the possible results. You can also list categories to use, which will help you to break the results down on the report.

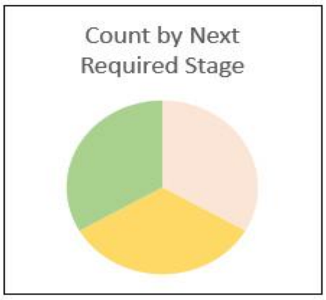




The report that is automatically generated is very useful. Above you can see a breakdown of the results obtained on the current active list of leads, as well as the archived list. You get to list up to 10 possible 'results' of the prospecting, and then assign a colour (red, yellow, or green) to each result. By then simply selecting the result achieved with each lead, will provide the data for this report.

Some potential result options could be things like, 'Called', 'Signed', 'On Hold', 'Rejected', etc. The each one could have a colour (green being positive, yellow being neutral, or red being negative) in order to show you how you are doing.

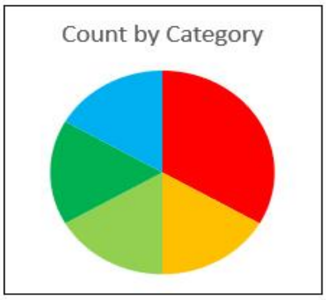
1 Overdue **1 Stale** **1 Active**



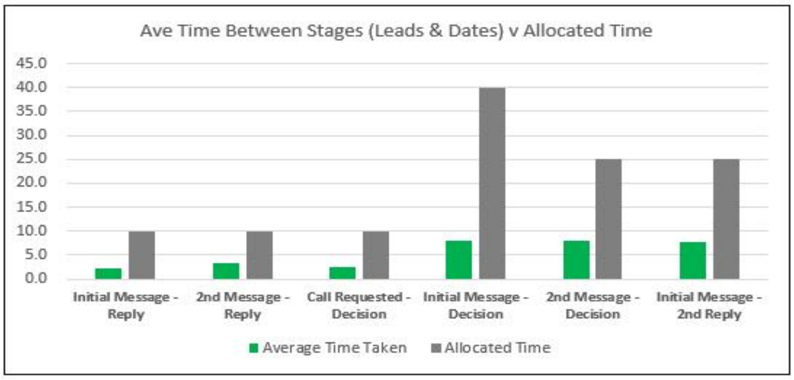
Count by Next Stage	
Initial Message	0
Initial No Reply	0
Initial Reply	1
2nd Message	1
2nd No Reply	0
2nd Reply	0
Call Requested	0
Call No Reply	0
Final Decision	1

Leads & Dates tab

Count by Category	
Cat 1	2
Cat 2	1
Cat 3	1
Cat 4	1
Cat 5	1



The report does more than just report on the results. As you can see above, you can also see how many tasks are currently at each stage (the next required stage) so you can see where you generally are in the grand process. Also, you can see a breakdown per category. You get to define these categories, so you can monitor anything you wish here. Maybe client types, maybe industries, possibly types of products or services, or maybe you have different initial questions and wish to see which one is more successful. You choose the categories, and then simply assign each lead to one of them, the spreadsheet does the rest.



% of Leads Needing Reminders at Each Stage	
Initial Contact Reminders	33.3%
2nd Contact Reminders	16.7%
Call Request Reminders	16.7%

Average Days Taken Between Stages	
Initial Message - Reply	2.2
2nd Message - Reply	3.3
Call Requested -Decision	2.5
Initial Message -Decision	8.0
2nd Message -Decision	8.0
Initial Message - 2nd Reply	7.7

Another useful feature on the report is the graph to show you how long (on average) you take on each stage of the process. As you can see, it then compares that average with the number of days that you have set for each stage. This will help you to see which parts are taking longer than others, so that you can reset the time period required if necessary.
It also shows you what percentage of leads required a follow up (no reply reminder) at each stage, which may be useful to see where you could potentially lose someone's interest.

Archive Data

Count by Category	
Cat 1	0
Cat 2	0
Cat 3	0
Cat 4	0
Cat 5	0

Relationship Between Categories and Results (Includes Leads & Dates AND Archived leads combined)

Categories	Result 1	Result 2	Result 3	Result 4	Result 5
Cat 1	1	0	0	0	0
Cat 2	0	0	0	0	0
Cat 3	0	1	0	0	0
Cat 4	0	0	0	0	0
Cat 5	0	0	1	0	0

The last aspect of the report simply counts how many leads are in each relationship between the category and the result. So, whatever categories you have used, will be compared to the possible results, and this table will show the number of leads relating to each. You will then be able to see if any category has obtained more positive results than the others, which could give you some very valuable insight into your marketing.

Task List

Your Business

Page 1 of 1

Select any required filters down the right, and then see any items that are allowed under the filters below. The items below will be in order of urgency, so based on the planned date of the next due task. Please ensure the filters are correct, if ALL filters in a particular field are left blank, then ALL that filter will not be applied.

Rank	Lead Name	Category	Last Action	Next Task Due	Due Date	Notes
1	Lead 2	Cat 2	19/01/2021	Final Decision	24/01/2021	
2	Lead 4	Cat 4	19/01/2021	Initial Reply	24/01/2021	
3	Lead 6	Cat 1	25/01/2021	2nd Message	30/01/2021	

Stage Filter	All ✓
Initial Message	
Initial No Reply	
Initial Reply	
2nd Message	
2nd No Reply	
2nd Reply	
Call Requested	
Call No Reply	
Final Decision	

Alert Filter	All ✓
Active	
Alert	
Due	
Stale	
Overdue	

Category Filter	All ✓
Cat 1	
Cat 2	
Cat 3	
Cat 4	
Cat 5	

Lastly, but certainly not least, there is another tab which shows you a very handy 'to do list. This updates automatically. It simply shows a list of tasks, in order of urgency, so that you know what to do first. Not only that, but it lets you filter certain data if you wish. If you only want to see overdue and due tasks, in a specific category, and at a certain stage of the process, you can see exactly those tasks.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.
All the other links you may need for more information, or to purchase this product, are below.

In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

£250

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