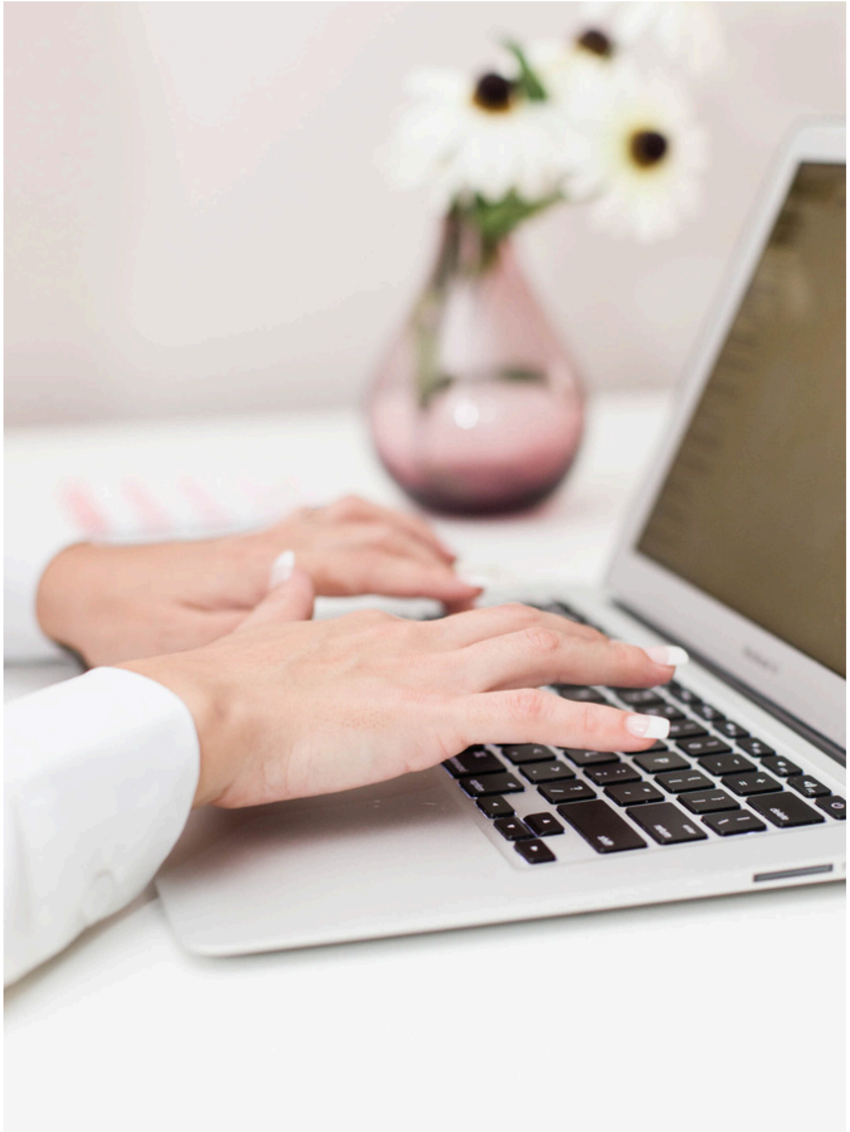

SALES SURGE

BUILD UNSTOPPABLE SALES MOMENTUM

WHAT TO EXPECT

- Kick-Off Session (replay will be sent)
- Daily Emails (Mon-Fri) with nurturing and sales activities
- Work Sessions @ 12pm (see calendar for specific dates)
- Feedback available during work sessions
- Celebrations & Fun!

WHY TRACK?

01
ORGANIZATION
You can easily track who's in your pipeline, where they came from, and what stage they're at. You will also be able to keep track of key information & next steps.

02
PREVENTS MISSED OPPORTUNITIES
You'll stop leaving money on the table & know exactly when to follow-up on key activities.

03
HELPS YOU NURTURE RELATIONSHIPS
By tracking specific details and personal information, your outreaches feel intentional & personal - not transactional.

04
SAVES TIME & ENERGY
Instead of trying to remember everything or having scattered notes, you'll have all your information in one place.

05
TRACK WHAT IS WORKING
You can analyze where your best leads are coming from (referrals, social media, networking, etc).

GETTING STARTED

Choose your tracking system - Google Sheets or Excel?

For this program, you can use a google sheet or an excel file to set-up your tracker. If you eventually want to move to a CRM (Customer Relationship Manager) system, you can easily import the information gathered in your tracker into the system of your choice.

Create Categories to Track for Leads/Clients

- Current Clients/Customers
- Past Clients/Customers
- Qualified Leads- ideal clients from past consults & inquiries
- Leads - potential ideal clients in current network (Phone, emails, social followers, colleagues, etc).
- By product/service, if applicable

Create Categories to Track Marketing/Referral Opportunities

- Professional networking groups/associations
- Podcasts
- Conferences, Events, Tradeshows
- Groups- LinkedIn, Facebook, Offline Communities
- Referral or Collaborative Partners

ORGANIZING YOUR INFORMATION

You'll want to include categories that help you stay organized, track progress, and ensure no one falls through the cracks. Here are some essential categories:

Basic Lead Info

1. Name – First and last name of the lead.
2. Business Name – If applicable.
3. Email Address – For easy follow-up.
4. Phone Number – Optional but useful for personal outreach.
5. Social Media Handle – If you connected via Instagram, LinkedIn, etc.

Lead Source & Engagement

1. Lead Source – Where they came from (referral, social media, webinar, networking, etc.).
2. Date First Contacted – The first time you reached out or connected.
3. How You Met – Brief note on how you connected (e.g., "DM on IG," "Met at networking event").
4. Last Contact Date – Helps ensure you're following up consistently.
5. Next Follow-Up Date – Keeps you on track for nurturing relationships.
6. Follow-Up Notes – Key details from past conversations (interests, struggles, etc.).

ORGANIZING YOUR INFORMATION

Lead Status & Sales Progress (after consult/sales call)

- Lead Status – Example statuses: New Lead, Interested, In Conversation, Proposal Sent, Closed – Won, Closed – Lost.
- Service/Product Interested In – What they're considering or what you pitched.
- Potential Deal Value – If applicable, estimated revenue from the lead.
- Objections or Concerns – Helps track why leads might not convert (e.g., timing, budget, needs).
- Closing Date (If Won) – The date they officially became a client.

Additional Notes & Relationship Building

- Personal Details – Anything to personalize future outreach (e.g., "Loves hiking," "Has a newborn").
- Referral Source (If Any) – Who referred them, so you can thank/referral-track.
- Next Steps – Specific actions (e.g., "Send proposal by 3/25," "Follow up after launch").

NURTURING ACTIVITES

Personalized Connection & Thoughtful Gestures

1. Send a Handwritten Note – A surprise "thinking of you" or "cheering you on" card stands out.
2. Drop a Fun Gift in the Mail – A small, unexpected gift (like a sticker, journal, or tea) makes people remember you.
3. Send a Playlist – Curate a Spotify playlist based on their vibe (focus, motivation, relaxation).
4. Text or DM Just to Say Hi – No pitch, no agenda—just a simple “Hey, how’s life?”
5. Remember Personal Details – Follow up on something they mentioned (a big goal, vacation, or challenge).

Engagement & Interaction

1. Surprise Coffee on You – Send a $5 Starbucks gift card via email or DM.
2. Comment on Their Stories & Posts – Engage naturally with what they share (without always bringing it back to business).
3. Create a Fun Poll About Life – Make it about something personal (e.g., "Do you drink coffee or tea?") to start a casual convo.
4. Give a Public Shoutout – Feature them in your stories, LinkedIn, or newsletter for something cool they did.
5. Introduce Them to Someone Amazing – Connect them with a potential collaborator, client, or friend.

NURTURING ACTIVITES CONTINUED

Community & Experiences

1. Host a Casual Virtual Hangout – A “bring your drink” happy hour or themed chat with no agenda.
2. Run a Fun Giveaway – Do something simple like a book, coffee, or a tool they’ll love.
3. Create an Inside Joke or Fun Challenge – Something like “Let’s all try a no-email-Friday challenge.”
4. Host a Co-Working Session – Set up a “Get It Done” session where people can work alongside you.
5. Do a Live ‘Get to Know Me’ Chat – Talk about non-business topics like hobbies, guilty pleasures, or funny stories.

Experiential & Emotional Connection

1. Share a Behind-the-Scenes Moment – Let them see your real, unpolished day-to-day moments.
2. Send a Meme or GIF Just for Them – Pick something funny or relatable based on a convo you had.
3. Ask for Their Opinion on Something Fun – “I’m picking a new planner—team digital or paper?”
4. Create a ‘Personalized’ Challenge for Them – Give them one fun task based on their goals.
5. Let Them in on a Secret – Share something personal or a "sneak peek" that makes them feel special.