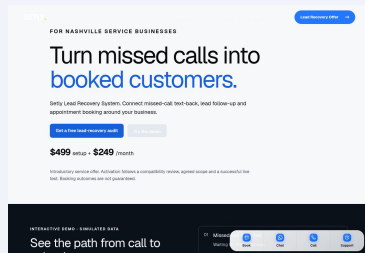


Three-touch follow-up planner

Plan a short follow-up sequence with clear reasons to stop.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Write the useful purpose of each follow-up rather than repeating the same sales line.
- 2 Choose timing appropriate to the customer's request and preferences.
- 3 Stop on a reply, booking, refusal or opt-out.
- 4 Set a final close-the-loop message instead of following up indefinitely.

EXAMPLE - ILLUSTRATIVE

After sending a requested quote, ask whether clarification is needed, then close the loop if there is no response.

CHECK YOUR RESULT

Would each message still feel useful from the customer's perspective?

Three-touch follow-up planner

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Touch 1 purpose and timing:**Touch 2 purpose and timing:****Final message:****Stop conditions:****Owner:****DONE WHEN**

Would each message still feel useful from the customer's perspective?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.