

Customer and Client

Follow-Up Emails Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

Follow-up is one of those jobs that is easy to delay, even when it matters. A new enquiry needs a reply. A proposal needs a gentle nudge. A client needs a check-in. Someone asked for more information and the email is now buried under everything else.

Jessanol can help draft, organise and track customer or client follow-up emails so opportunities and relationships are easier to manage.

THIS IS USEFUL IF

This type of support may be useful if:

-  Enquiries are not always followed up consistently
-  You have proposals, quotes or conversations that need a nudge
-  You want to check in with previous clients
-  You need polite follow-up emails drafted
-  You want standard wording for common follow-up situations
-  Follow-up actions are sitting in your inbox or memory

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help with customer and client follow-up emails or messages.

This may include:

- Drafting follow-up emails or messages
- Creating or updating follow-up templates
- Tracking who needs to be contacted and when
- Adding follow-up actions to a CRM or task list
- Preparing gentle reminder emails
- Sending agreed follow-ups where appropriate
- Recording responses or next steps and flagging replies that need your attention
- Creating a simple follow-up process

RECOMMENDED RHYTHM

This can be done weekly, after specific enquiries, or as part of regular client communication support.

For example:

- Follow-up after discovery calls or enquiries and regular follow-up reviews
- Proposal or quote follow-ups
- Previous client check-ins and post-project follow-ups

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Access to relevant email threads, CRM records or task lists
- Details of who needs following up
- Previous examples of your tone, and existing templates or wording if available
- Guidance on what Jessanol can send directly
- Guidance on when something should be escalated to you
- Details of any deadlines, proposals, quotes or agreed next steps

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- Who needs to be followed up
- Why they are being contacted
- What tone should be used
- What Jessanol can draft or send directly
- What needs approval before sending
- How responses should be recorded
- What should be added to the CRM or task list
- When follow-up should stop or change approach

Follow-up emails should be clear, polite and appropriate to the relationship. Jessanol can help draft and organise follow-up, but decisions about pricing, negotiation, complaints or sensitive client matters should remain with you unless otherwise agreed.

STEP-BY-STEP INSTRUCTIONS

1. Confirm who needs to be followed up and why.
2. Review any relevant email threads, notes, CRM records or proposals.
3. Check the agreed tone, timing and next step.
4. Draft or select an appropriate follow-up email.
5. Share for review or send directly if agreed.
6. Record the follow-up in the agreed CRM, tracker or task list.
7. Add any future follow-up date if needed.
8. Flag any replies that need your attention.
9. Update the status once the follow-up is complete or no longer needed.

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- Details of who needs to be followed up
- The reason for the follow-up
- Any relevant email thread, proposal, quote or note
- Examples of your preferred tone
- Guidance on what Jessanol can send without checking first
- Guidance on what should come back to you
- Details of where follow-up actions should be recorded

You do not need to have a formal follow-up system before support starts. Jessanol can help turn scattered reminders, email threads and “I must reply to that” notes into a clearer process.

WHAT YOU’LL GET BACK

You should have:

- Clearer follow-up emails
- Fewer missed opportunities
- More consistent client communication
- Follow-up actions recorded in one place
- Less awkward “I meant to reply sooner” admin
- A way to keep conversations moving

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: jane@jessanol.com