1 Introduction

This article looks at the importance of follow-up and how to use Outlook Flags to assist with follow-up and keeping track of contacts. While follow up is most important for sales-related activities, it applies equally to almost any aspect of daily life, such as making sure you contact your mother on a regular basis. So hopefully this article will be of interest not just to salespeople and small business owners, but to anyone using Outlook who wants to manage their contact with people more effectively, whether these be friends, colleagues, prospects, club members, etc.

If you just want to know the technical details about using Outlook Flags for follow-up, you can skip straight to the section on Using Outlook Flags.

2 The Importance of Follow Up

In business and sales, whether in internet/web marketing or more traditional (off-line) marketing, follow-up is one of those fundamentals that everyone understands the importance of — but that few do wholeheartedly — and that even fewer do systematically.

A study done by the Association of Sales Executives revealed that 81% of all sales in a business-to-business environment (i.e. not the consumer goods marketplace) happen on or after the fifth contact. That is, most prospects simply don't buy the first time they make contact with you. They have to encounter a marketing message or engage with the company selling the particular product multiple times before making a purchasing decision. This makes follow-up an essential ingredient in the selling process.

The tragedy is almost 80% of salespeople give up after the second contact. The reason for this is usually not because they don't want to or are not motivated to, but because they simply do not have an organized mechanism to keep track of any ever increasing number of contacts who need return calls at differing times in the future.

Obviously the frequency and amount of follow up needed depends on the complexity of what is being sold and its life span. Generally the higher the value of the item for sale, the longer the associated sales cycle, (and corresponding usage cycle), and therefore the greater the need for consistent follow-up.

So following up is an important aspect in developing your business. It helps you build trusting ongoing relationships with your clients. And the most significant sales are usually the result of these relationships.

There are at least four obvious advantages of the follow up process:

1. Winning the business

As mentioned above, if over 80% of sales are made after the 5th contact, and these contacts may be made over a long period of time (often several months or in some cases years), it is imperative to be able to maintain contact with an increasing number of prospects and get back to each of them at the required point in time.

2. Keeping your actual customers

Regularly following up with your customers will convince them they’ve made a good choice doing business with you. Gain their trust and the next time they will want to purchase, they will look no further than you. Added to this is the fact that it will usually only cost 10 to 15 percent of your marketing budget to secure additional business from existing customers, as opposed to consuming 100 percent of your marketing costs to get business from new customers. Put another way, it’s 10 times harder to get business from a new customer than to win repeat or additional business from an existing customer.
3. Generating referrals
   A satisfied client will usually tell his or her friends about you. Having already experienced the benefits of your services, he will talk to them with first-hand knowledge and you may get valuable referrals as a result of this.

4. Sustaining a long-term campaign
   Your business grows in the moments between sales. Follow-up campaigns require a lot of your attention and effort, but they are a step towards new deals.

There are at least four methods that you can use to make your follow-up efficient:

1. Post-Sale feedback
   After completing a deal with a customer, call him or her and ask if they were pleased with the product or service provided, what they like most about the product, system, etc. and about working with you and what they would like to be improved. Show them that you care about them and not only about your business.

   When you ask customers for feedback and take into account their suggestions, they feel a sense of ownership in what you’re doing and you increase your chances of making them loyal to your services.

2. Respond to your Client’s Needs
   Your customers’ plans and needs change in time. They might not be the same as the last time they dealt with you. Be sensitive to each customer’s needs and offer them the information that best suits their interests.

   When you talk to your customers about their requirements, don’t be afraid to position yourself as an expert in your business giving sound advice.

3. Consistent quality communication campaign
   Keep in touch with your clients through a consistent quality communication campaign. You can use a variety of communication tools ranging from thank-you notes, phone calls, e-newsletters, sales letters, faxes and snail mails. (This will be covered in more detail in a later article).

   Send them useful information on general topics relating to what they purchased from you. You can send them periodical printed and electronic newsletters with personalized information according to their interests.

   Where applicable, use anniversaries and special occasions to thank your customers for their support.

4. Getting personal
   Gather information about your clients and record it in your Contacts folder. When you show customers that you really care about them on a personal level, their trust runs higher and it’s more likely to choose you again when they need something.

   The basis of following up with your customers is to show them that you are not interested only in closing deals, but in building relationships. Trust is the key element which motivates your customers to keep coming back.

3 Systematic Follow Up
   The effectiveness of follow-up is dramatically increased when it is done systematically and consistently.
Many people think that they are capable of handling all their follow-ups without an organized system, but usually they are just not aware of how much business they’re losing because they actually cannot cope with the amount of follow-up required.

Using a computerized Contact Management System to track your connections with people and to systematize the process will generally cause your business opportunities to explode.

Outlook already has the basic mechanisms required to manage your contacts and keep track of when they should be called back. The Contacts, Calendar and Tasks facilities are generally used for this. (For a system that enhances Outlook’s capabilities in this area, see the description of MX-Contact at the end of this article, which adds to Outlook’s contact management functionality).

However Outlook has another mechanism that is very useful for basic follow-ups, namely Flags.

4 Using Outlook Flags

Flags are used as follow-ups and reminders on e-mail messages and contacts. You use Outlook flags to remind yourself to follow up on an issue or to indicate a request for someone else. A reminder date and time can also be added and displays in the reminder window.

There are 6 different coloured flags available for e-mails. You use the colored message flags to manage your incoming e-mail items by flagging the items for different kinds of follow-up. For example, use the red flag to mark messages that require immediate attention, and the blue flag for messages to read later. When you add a message flag, the background color of the Flag Status column changes color to make it easy for you to quickly find items in the message list while scrolling. Items you add a message flag to will automatically display in the For Follow Up Search Folder. However, an e-mail item sent to you with a message flag will not appear in this Search Folder, unless you add a flag to the item.

4.1 Adding a Flag

To flag an e-mail or contact for follow-up, do the following:

1. In the message or contact, click the Follow Up icon:

2. In the Flag to list, select the text you want, or type your own:
3. In the **Flag color** list, select the color flag you want. Note: The **Flag color** option is not available for contacts.

4. Enter a date and time in the **Due by** boxes.

5. On clicking **OK**, note that the e-mail message is now marked to be followed up (in this case Read by Monday, 8 May at 10:00 a.m):

6. On Monday a reminder will automatically appear at 10:00 a.m., prompting you to read the e-mail or call the contact, as the case may be.

### 4.2 Creating Views to Organize your Follow-Ups

Once you marked various items to be follow-up, you need to create a series of views to focus on items to be followed up.

Begin by creating a view showing all e-mails that have a coloured flag:

1. Create a View called **Flagged Messages** with the Filter set to **Only items which have a colored flag**:
2. You can group the View by Follow Up Flag if necessary:

3. Apply the View:
Creating a selection of Views sorted and Grouped by Flag Status/Color/Follow up Flag will help you organise yourself in terms of which items need action and what the priority of these follow-ups is.

**Note:** For more details on creating views, see the following article:

**Profiling Contacts / Creating Views**

### 4.3 Marking an Item Complete

Once you have done the follow-up, you can mark the item complete. Do the following:

1. If it’s an e-mail message, clicking on the **Flag Status** column will mark the e-mail complete:

2. Alternatively you may right-click on the e-mail and select the options from the **Follow Up** menu:
Marking an item complete will automatically drop the item out of the “Flagged Messages” view.

4.4 Creating a Flag Toolbar

You might find it useful to add a text label to the coloured Quick Flags you use to help you keep track of what each colour-coded flag means. To name your Quick Flags, just add them to an existing or custom toolbar, and then label each flag. You can name each flag anything you want. Adding a name to a Quick Flag does not apply a category or add functionality to a flag. Instead, it is a just a way for you to remember what each flag colour means to you.

1. In Outlook, right-click any toolbar, and then click Customize.
2. On the Toolbars tab, click New, and then, name the toolbar something like Flags, and drag that toolbar to where you want it to be.
3. Right click on the new Toolbar again and select Customize. On the Commands tab, under Categories, click Actions, and then drag a flag, such as the red flag, to the new toolbar.
4. Right-click the flag in the new toolbar, and then on the shortcut menu, click Image and Text.
5. Right-click the flag again, and in the Name box, type the name for the flag, for example, Urgent. If you want to use a keyboard shortcut for the quick flag, type &Urgent, which allows you to activate the flag by pressing ALT+U.
6. Note: Make sure you put the ampersand (&) before a letter that is not being used as a keyboard shortcut by another button on any toolbar in Outlook. For example, Call Bac&k allows you to activate the flag by pressing ALT+K as long as no other buttons use ALT+K as a keyboard shortcut.
7. After you have added all of the flags you want on the toolbar, click Close in the Customize dialog box.
5  **MX-Contact: Managing Follow-Ups with Outlook/Exchange**

If you’re looking for an application to assist you with managing a contact list of some kind, whether it be customers, prospects, members, suppliers or whatever, and following up these contacts in a variety of ways, check out [MX-Contact](http://www.mxcontact.com). **MX-Contact** is a CRM, Contact Management and Sales Automation package that runs inside Microsoft Outlook 2000, 2002 or 2003. The system utilises all the standard functionality of Outlook but provides many additional features that transform Outlook into a powerful Contact Management and CRM system.

MX-Contact has 7 different versions available catering for a single user through to an enterprise with thousands of users, with data storage in an Outlook Data File, Exchange Server Public Folders, or Microsoft SQL Server.

MX-Contact comprises a **Base System**, with optional **Sales, Marketing** and **Support** modules that can be added at any time. So you can use MX-Contact just for managing the contacts and/or companies you deal with, and the interactions (phone calls, e-mails, appointments, etc.) you have with them, plus use it to manage your sales opportunities, events and/or customer support incidents, by adding any of the available modules.

6  **About OutlookWise and ExchangeWise**

[OutlookWise](http://www.outlookwise.com) is both a web site and newsletter aimed at keeping Microsoft® Outlook® users up-to-date with news, information and articles of interest on Outlook and Exchange Server, as well as reviews of add-on products and utilities, all geared to enhancing your knowledge of Outlook and increasing your productivity.

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OutlookWise is a service to the Outlook community from [ExchangeWise](http://www.exchangewise.com), which is a specialist software company focusing on the development and marketing of applications and utilities that enhance the functionality of Microsoft Outlook and Exchange Server.

OutlookWise is edited by [Brian Drury](http://www.outlookwise.com), founder of ExchangeWise, and the architect of **MX-Contact**, a CRM, Contact Management and Sales Automation System for Microsoft Outlook. Brian has over 20 years experience in the IT industry and has focused on CRM, Messaging and Collaboration systems for the last 15 years.