



CUSTOMER FOLLOW-UP CHART

Person Buys Product or Service

DIGITAL PRODUCT



1. Email immediately sent out with download link and contact info in case of difficulty. Add picture of product if possible – adds to feeling of value.
2. 30 Days Later: Email sent out requesting feedback. What did you think? How did it work for you? Any questions, or suggestions to make it better?

OPTIONAL: Transfer customer To Newsletter sequence or Blog Subscriber list.

PHYSICAL PRODUCT



1. Email with purchase confirmation, invoice, or receipt, and shipment tracking number sent out.
2. 30 Days Later: Email sent out requesting feedback. What did you think? How did it work for you? Any questions, or suggestions to make it better?

OPTIONAL: Transfer customer To Newsletter sequence or Blog Subscriber list.

SERVICE or SESSION



1. Email sent out with purchase confirmation, along with instructions for how to book a session, or schedule a service. Perhaps you use an online booking tool like [TimeTrade.com](https://www.time-trade.com) or perhaps you have them phone or email your Assistant to schedule.
2. 30 Days After Session or Service: Email sent out requesting feedback. What did you think? Were you happy with the experience? Any questions, or suggestions to make it better?

OPTIONAL: Transfer customer To Newsletter sequence or Blog Subscriber list.

Autoresponder Quality Control Checklist

- Is your branding (your look & feel) cohesive?
- Do you have a product name, or course name? If so, make sure you format it the same way every time it appears (bold, italics, caps, etc. – whatever you choose).
- Decide whether to send people to a public page, or a hidden page.
- Does your email sound like YOU – does it match your personality?
- Is your email visually appealing? Should you add a photo or image?
- Do you want to invite discussion or feedback?
- Do you list your website and contact info to show you're legit?
- Do you need a legal disclaimer at the bottom of your emails?