2. Setting Automated Follow Ups

8. Calendar Best Practices · https://clients.financevine.ca/docs/2-setting-automated-follow-ups-up/

Securing that initial "**yes**" with a **FinanceVine** lead is just the beginning. Nurturing that interest through effective follow-ups is crucial for converting leads into closed deals. However, the key is striking the right balance. Too many reminders can quickly become overwhelming, leading to cancellations or even alienating the client altogether.

The Pitfalls of Over-Communication

In today's digital age, automation is a powerful tool. However, it's *essential* to wield it with finesse. Bombarding leads with a barrage of automated follow-ups can create a sense of pressure and intrusion. This can lead to:

- **Cancellation Fatigue:** Every reminder provides an opportunity for the lead to reconsider or cancel the appointment. Excessive reminders simply increase the chances of this happening.
- **Annoyance and Distrust:** Overly frequent communication can be perceived as pushy or impersonal, eroding trust and damaging the relationship.
- **Information Overload:** Leads are already bombarded with notifications. Too many reminders can get lost in the noise or simply become an annoyance.

FinanceVine's Sweet Spot: The Single, Timely Reminder

Through careful experimentation, **FinanceVine** has identified the optimal follow-up strategy: a single, automated text message two hours before the scheduled meeting. This approach offers several key advantages:

- **Timely Reminder:** Two hours provides a gentle nudge without being overly intrusive. It gives the lead enough time to prepare without feeling pressured.
- **Reduced Cancellation Risk:** By limiting the reminders, we minimize the opportunities for leads to back out.

- **Respect for Lead Time:** A single, concise reminder demonstrates respect for the lead's time and avoids unnecessary disruption.
- **Maximizing Show Rates:** By respecting the lead's time, they are more likely to show up for the appointment.

The Power of Subtlety

The success of this approach lies in its subtlety. It's a gentle reminder, not a relentless barrage. By respecting the lead's time and avoiding over-communication, advisors can cultivate a positive and productive relationship. This approach increases show rates and helps to foster trust, which is essential for converting **FinanceVine** leads into successful deals. Sources and related content