

### **SOP: Warm Letter Process**

- At the beginning of the year map out The Topics for "Most" of the months. Coordinate things that happen regularly in the business.

For example: Everyone wants to get organized during January and the Fall (those letters will speak to that)

In January do a "meet the team" and talk about changes/ updates/ team growth etc. (impression of increase).

- Put a reoccurring Project in Asana with the pre-selected topics all listed month by month.
- Schedule the time INTO my Marketing calendar to write the content
- Write the monthly piece and have 1 CLEAR call to action.
- Make it "pretty" on letterhead or fun print (assign to VA)
- Proof letter for typos
- Send letter to a local print shop to print
- Print 10 more than current "list" size
- Have team pick up printing
- Kelly to review the ABC list before each mailing
- Assign to Team (Pat) to hand address all the envelopes
- Use self-sticking envelopes whenever possible
- Buy envelopes in Bulk (Amazon) (Free delivery with prime acct.)
- Have Team member put a check on Excel file for that "month"
- To SAVE time I do NOT put a name at the top. All mine open the way my ezine does: "Hey there!"
- If I want to "connect" deeper with a person I write on the TOP of that page in pen "hey, let's get a lunch date on the calendar/meet for coffee/invite you to a thing"  
  
Then reach out in 1 week to get a date on the calendar
- "KEEP" one for myself as a Hard copy

- Get quiet and set an intention for the letter to reach/empower/encourage/connect etc. (i.e.: That this letter will result in 3 new referrals over next 60 days) (To book 3 organizing sessions with NEW clients). The intention is Based ON what the CLEAR call to action was.
- Write the intention on my hard copy
- Keep hard copy in a REAL folder (Marketing Tickler file)
- Save any additional "copies" not used in the Marketing Tickler File
- Save document on computer folder tagged "Warm letters"  
File name as "Topic – Month- Year"

### Managing the List

- Each name on List is ABC
- Send A and B once per month (PLUS extras once per quarter if necessary)
- Send to C's every 2 months or Once per quarter (always send for organizing and holiday help)
- Review List once per month before mailing (who's ON list? Clients/ previous clients/good connections/COI)
- Keep List as an Excel file
- Store list on Google Docs (so team can update as necessary)
- When I meet someone NEW at a networking function they go into my "follow up process" which includes going ONTO the WL list
- Assign that business card to my Team support to send initial follow card and add to list
- As relationships deepen (people go up or down on the ABC scale)
- Follow up call: Choose 20 or 30 per month and call them as a follow up to the letter ask "did you like it/read it/ok to stay in touch?" (Put an X in the Excel file)
- Recycle letter  
Use letter as CONTENT for my blog/ezine/social media etc. (MP Multi-purpose Process)
- Schedule 1 hr per month to write it/ approve it and send to printer
- Schedule 30 mins to review list