

DBR AI LEVERAGE LAB · WEEK 5 · FOLLOW-UP · FULL-COLOR FIELD EDITION

Follow-Up Machines

Build a thoughtful follow-up system that keeps relationships moving without becoming pushy.

Built to turn clear ideas into useful, responsible action.

Build a thoughtful follow-up system that keeps relationships moving without becoming pushy. This edition preserves and organizes the supplied training material into an easy-to-study magazine experience.

01 · FIND THE SIGNAL

Use the source guidance to identify the ideas, prompts, examples, and decisions that can improve your next workweek.

02 · APPLY WITH JUDGMENT

Review all client-facing language, validate relevant facts, and keep human responsibility in every important decision.

03 · TURN IT INTO A HABIT

Take one useful idea from this guide and make it part of a repeatable rhythm rather than a one-time experiment.

06 · MAGAZINE PAGES

Designed for online reading, printing, discussion, and action inside the DBR AI Leverage Lab library.

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FOLLOW-UP MACHINES Build the sequence once. Let it work forever. DBR AI Accelerator — Week 5 Student Handout The follow-up ladder, a fill-in 30-day sequence, your objection library, and this week's homework.

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The Big Idea This Week The fortune is in the follow-up. 80% of sales take five or more touches — and most producers stop at two. The gap between 2 and 5 is where the money is. You don't need to be pushy; you need to be present, consistently. This week you build two machines that make that automatic: a 30-day follow-up sequence and an objection library. AI keeps the cadence. You bring the relationship. AI drafts and reminds; you approve and send.

Part 1 — The Follow-Up Ladder Four kinds of touch. Rotate them so you're always adding value, never just "checking in."

Touch What it does

Value Give something useful — a tip, resource, or answer. No ask. Check-in A short, warm "still here for you" with one easy question.

Story A quick client story that shows the problem you solve.

Direct ask A clear, low-pressure next step: a call, a quote, a yes/no.

★ Rule: Rotate value → check-in → story → ask, then repeat. Never send four asks in a row.

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Field Notes 02

Part 2 — Your 30-Day, 8-Touch Sequence Write it once; run it on every new prospect. Draft all 8 with AI, then jot your version of each below (or paste the AI draft). Suggested rhythm — mix the four ladder types: Day 1 — Value (thank + one useful thing)

Day 3 — Check-in (easy question)

Day 7 — Story (a quick client win)

Day 12 — Value (resource or tip)

Day 18 — Check-in (warm nudge)

Day 24 — Story + soft ask

Day 30 — Direct ask (clear next step)

Day 30+ — Long-term value touch (monthly)

Build it with AI “Using my business brief above, write a 30-day, 8-touch follow-up sequence for [type of prospect]. Use touches on days 1, 3, 7, 12, 18, 24, 30, and a monthly value touch after. Rotate value, check-in, story, and one direct ask. Each message short, warm, in my voice, no pressure.”

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Part 3 — Your Objection Library Never get caught flat-footed. Prepare your top 10 objections with three responses each — one logical, one emotional, one with a short story. “List my 10 most common objections as a [my role]. For each, give me 3 responses — one logical, one emotional, one with a short story. Each under 70 words, in my voice, no pressure.” Then have Cowork format it into a clean one-page playbook you can reference on a call. Add real objections you hear as you go — it compounds over time.

Automate vs. keep human Let AI draft / schedule Keep it human (you)

Routine value + check-in touches The actual send — approve every one

Routine value + check-in touches The actual send — approve every one

The first draft of every message The close and hard conversations

Reminders of who's due Anything emotional or high-stakes

Repetitive sequence steps The relationship — always yours

Part 4 — Reactivate Your Dead Pipeline Your fastest win this week is hiding in prospects you already gave up on. “Here are 5 prospects who went quiet [paste names + last context]. Write a warm re-opening message for each — no guilt, no pressure, lead with value and end with one easy question.”

This Week's Homework ☐ Build your 30-day, 8-touch follow-up sequence (template above). ☐ Build your objection library — 10 objections, 3 responses each. ☐ Put 5 stalled prospects into the sequence this week. ☐ Bring your best reactivation win to next class. Next week (Week 6): Content & Social Media at Scale — 30 days of content from one hour of work.

Golden Rules • AI drafts, you approve — read every message before it sends. • Follow up to serve, not to pester — lead with value, keep it low-pressure. • In financial services, mind guarantees and claims; verify before you send. • Never paste sensitive client data (SSNs, account or health details) into any AI tool.

Build the machine. The fortune is in the follow-up.

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The advantage appears when the lesson becomes a habit.

Choose one idea from this guide, put it into a real workflow this week, and review it in your own voice and judgment.

ONE DECISION · ONE ACTION · ONE BETTER WEEK