THE ESSENTIAL GUIDE TO THE 333 RULE IN SALES

HOW TO FOLLOW UP FASTER, MORE CONSISTENTLY AND MORE USEFULLY

For SME Business Owners
A practical step-by-step guide from CH4B.

CH4B

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1. Introduction

Most businesses would say they follow up with prospective customers.

The problem is that “follow up” can mean very different things to different people.

For one person, it means sending an email straight after a meeting.

For another, it means making a note to call next week.

For somebody else, it means sending a proposal and waiting for the prospect to come back to them.

Everybody believes they are following up.

But without an agreed process, follow-up can quickly become inconsistent.

That matters because a promising sales conversation is only the beginning.

What happens next can determine whether that initial interest develops into a genuine opportunity or simply disappears into a busy inbox.

The answer is not to chase people relentlessly.

It is to create a simple, useful and repeatable process.

*That is where the **3-3-3 Rule** comes in:*
3 touches.
Within 3 days.
Across 3 different channels.

The 3-3-3 Rule replaces a feeling with a process.

Instead of asking your sales team to “make sure you follow up”, you give everyone a clear framework for what good follow-up looks like.

It encourages speed without pressure.
Consistency without becoming robotic.
Persistence without simply chasing.

Most importantly, it encourages every interaction to have a purpose.

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If you're asking yourself these questions, read on

- Are we following up with new enquiries quickly enough?
- Does everybody in the business follow the same process?
- Are we relying too heavily on email?
- How do we stay visible without becoming annoying?
- What should we actually say after the first follow-up?
- How do we make sure promising opportunities do not simply disappear?

This guide will:

- **Help you introduce a clear structure for the first three days of sales follow-up**
- **Show you what each of the three touches should achieve**
- **Give you practical examples you can adapt to different sales conversations**
- **Help you turn follow-up from a collection of good intentions into a consistent sales process**

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2. Why Good Opportunities Get Lost in the Follow-Up

Sales opportunities do not always disappear because the prospect has decided against you.

Sometimes, life simply gets in the way.
Emails arrive.
Meetings take over.
Priorities change.
Other people become involved in the decision.

The prospect intends to reply, but something else becomes more urgent.

This is why relying on one message and waiting is rarely a strong follow-up process.

It puts all the responsibility on the prospect to keep the conversation moving.

At the other extreme, repeatedly sending messages that say little more than "just checking in" can quickly feel like chasing for the sake of chasing.

Neither approach is particularly useful.

Good follow-up should make it easier for the prospect to continue the conversation.

It should remind them who you are.
Demonstrate that you listened.
Make the next step clear.
And, where possible, give them something useful.

That requires ***more than persistence.***

CH4B Insight

A good sales process should not depend on somebody remembering to follow up.
The clearer the process, the easier it becomes to create consistency across the business.

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3. The 3-3-3 Rule

The principle is deliberately simple:

3 TOUCHES
Make three purposeful follow-up touches.

3 DAYS
Complete those touches within the first three days following the enquiry or conversation.

3 DIFFERENT CHANNELS
Use three appropriate ways of reaching the prospect rather than relying on a single channel.

For example:
Touch 1: *Personal email*
Touch 2: *Phone call*
Touch 3: *LinkedIn message*

The exact combination can change depending on the prospect, the information they have provided and the nature of the conversation.

The principle remains the same.

Do not rely on one attempt, one channel or somebody remembering what to do next.
Create a clear process.

The three touches also have different jobs:

Touch One: Confirm
Show that you listened and make the next step clear.

Touch Two: Connect
Use another appropriate channel to make it easier to continue the conversation.

Touch Three: Add Value
Give the prospect a useful reason to engage rather than simply asking for an update.
That distinction matters.

The 3-3-3 Rule is not three versions of: *"Have you made a decision yet?"*

Each interaction should move the conversation forward in a useful way.

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4. Step 1: Touch One, Respond While the Conversation Is Fresh

Objective: Confirm the conversation, demonstrate that you listened and establish a clear next step.

Why this matters: The first follow-up is your opportunity to turn an initial conversation or enquiry into a clear continuation. Leaving it too long can create unnecessary distance between the prospect's interest and your response.

The first touch should therefore happen promptly.

Where practical, aim to send it within hours of the enquiry or conversation rather than automatically leaving it until the following day.

Here's how:

1. Make it personal

Avoid starting with a generic template that could have been sent to anybody.

Reference something specific.

What did they tell you?

What challenge are they trying to solve?

What outcome matters to them?

What did you agree would happen next?

Even one specific reference can demonstrate that the message relates to their conversation rather than simply being the next automated stage in a sequence.

For example:

"Thanks for the conversation earlier. Your point about needing greater consistency across the sales team really stood out."

That immediately feels more relevant than:

"Thanks for your time today. It was great speaking with you."

The second version is polite.

The first demonstrates that you listened.

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Step 1: Continued ....

2. Keep it focused

Your first follow-up does not need to repeat the entire sales conversation.

The prospect has just had that conversation.

Give them what they need next.

A useful structure is:

What you heard.
What you agreed.
What happens next.

That might take only a few sentences.

3. Make the next action obvious

Avoid ending with an unclear:

"Let me know what you think."

Where a next step was agreed, restate it.

For example:

"As discussed, I'll send the proposal across on Thursday covering the two options we talked through."

Or:

"The next useful step is to involve Sarah in the conversation, so I'll send over some times for the three of us."

Clarity reduces unnecessary back-and-forth.

4. Do what you said you would do

Follow-up loses credibility quickly if the message promises something that never arrives.

- If you agreed to send information, send it.
- If you agreed to introduce somebody, make the introduction.
- If you committed to a deadline, meet it.

The first follow-up is not only communication.

It is an early demonstration of how you work.

CH4B Tip

Before sending your first follow-up, remove anything that could have been written without having the conversation.

Then add one detail that proves you were listening.

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5. Step 2: Touch Two, Change the Channel

Objective: Continue the conversation through another appropriate channel rather than relying entirely on the first message being seen and acted upon.

Why this matters: You do not know how somebody manages their communication.

They may receive hundreds of emails.
They may rarely check LinkedIn.
They may prefer speaking by phone.

A message can go unanswered for many reasons.

Changing channel gives the prospect another opportunity to see and respond to you without simply sending the same email again.

Here's how:

1. Choose a channel that makes sense

If your first touch was an email, the second could be a call.

Or a LinkedIn message.

If the relationship began through LinkedIn, email or telephone may be more appropriate next.

The important point is not to use channels simply because they exist.

Use channels that are appropriate to the relationship and the contact information the prospect has chosen to share.

2. Do not repeat the first message word for word

Changing channel but copying and pasting the same message misses the point.

The second touch should feel natural in the channel you are using.

A LinkedIn message may be short and conversational.

A phone call gives you an opportunity to continue the discussion directly.

The message should fit the medium.

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Step 2: Continued ....

3. Give the contact context

Do not assume somebody immediately remembers every conversation they have had.

A short reminder helps.

For example:

"Hi James, we spoke yesterday about the issues you're having with inconsistent follow-up across the sales team. I sent you an email afterwards but thought I'd connect here too."

Clear.

Relevant.

Easy to understand.

4. Keep the pressure low

The purpose of changing channel is not to surround the prospect.

It is to make communication easier.

Avoid language that creates unnecessary pressure or makes the person feel they are being chased.

You are continuing a conversation, not demanding an answer.

CH4B Insight

Different channels create different opportunities for engagement.
The objective is not to be everywhere.
It is to make it easy for the prospect to continue the conversation.

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6. Step 3: Touch Three, Add Value

Objective: Give the prospect a useful reason to re-engage rather than simply asking whether they have made a decision.

Why this matters: By the third touch, repeating the same request for an update adds very little.

This is where your follow-up should become useful.

Instead of asking the prospect to give something to you, ask what you can give to them that helps with the challenge they have already discussed.

Here's how:

1. Return to what they told you

Think back to the conversation.

- Did they ask a question you could answer more fully?
- Did they mention a problem that relates to a useful guide?
- Would an appropriate case study help them understand how something works?
- Is there a resource that would help them think through the decision?
- Could you clarify something that may have been unclear?

The best value-add is usually connected to something the prospect has already said.

2. Make the value relevant

Sending somebody a random article is not automatically valuable.

Neither is attaching every brochure your business has ever produced.

Relevance matters more than volume.

Explain why you are sending it.

For example:

"You mentioned that getting the rest of the leadership team involved could be the difficult part. This short guide explains the process we discussed and may be useful to share with them."

The prospect immediately understands why it matters.

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Step 3: Continued ....

3. Stop "just checking in"

There is nothing inherently wrong with checking progress.

The problem is when that becomes the entire purpose of the communication.
Instead of:

"Just checking in to see if you've had a chance to look at my email?"

Try to move the conversation forward.

For example:

"You asked how this might work with your existing CRM. I've pulled together the three points that are most relevant to your setup."

One asks for attention.
The other earns it.

4. Keep it proportionate

Adding value does not mean creating hours of unpaid work for every prospect.

Sometimes a useful answer is enough.

Sometimes it is an existing guide.

Sometimes it is a relevant example.

Sometimes it is simply clarifying a question properly.

The objective is usefulness, not volume.

CH4B Tip

Before sending your third touch, ask:
"Does this give the prospect anything useful, or am I simply asking them to reply?"

If the answer is the latter, look for a better reason to make contact.

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7. Putting the 3-3-3 Rule Into Practice

The principle stays the same.

The execution should reflect the situation.

Here are a few examples:

Scenario 1: A New Website Enquiry

Someone completes an enquiry form asking about your services.

Touch One: *Email*

Respond promptly.

Thank them for the enquiry, reference what they have asked about and suggest a clear next step.

If they have provided useful context in the form, refer to it.

Touch Two: *Phone*

Where appropriate and where they have provided a number for contact, try calling.

Keep the purpose simple.

You are responding to their enquiry and trying to understand what they need.

Touch Three: *Alternative Channel or Useful Follow-Up*

Depending on the contact information and conversation so far, use another appropriate channel and add something useful.

That could be an answer to a question, a relevant resource or additional information that helps them decide whether the next conversation is worthwhile.

Scenario 1: A New Website Enquiry

You have had a good first conversation and agreed there may be an opportunity to work together.
Touch One: *Email*

Summarise the important points while the conversation is fresh
.
Reference their priorities and confirm the agreed next step.

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Putting the 3-3-3 Rule Into Practice Continued ....

Touch Two: *LinkedIn or Phone*

Reconnect using a different appropriate channel.

Keep it personal and connected to the original conversation.

Touch Three: *Add Value*

Send something that helps them think about the issue.

A relevant case study, useful guide, answer to a question or clarification of something you discussed could all work.

Scenario 3: After Meeting Someone at an Event

You have met somebody at a business event and had a conversation worth continuing.

Touch One: *Personal Message*

Reference the actual conversation.

Not:***"Great to meet you at the event."***
Instead: "***Great to meet you yesterday. I kept thinking about what you said about trying to grow the sales team without losing the personal approach that's worked so far."***

Now they know exactly who you are.

Touch Two: *Connect Elsewhere*

If appropriate, connect through LinkedIn or another professional channel.

Add context to the request rather than relying on a blank connection invitation.

Touch Three: *Give Them a Reason to Continue*

Share something useful that connects to the conversation, or suggest the specific next step you discussed.

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Putting the 3-3-3 Rule Into Practice Continued ....

Scenario 4: After Sending a Proposal

A proposal should not automatically signal the end of active communication.

Touch One: *Confirm*

Let the prospect know it has been sent and highlight anything they should pay particular attention to.

Touch Two: *Change Channel*

Use another appropriate channel to make sure they have what they need.
Rather than asking whether they have "looked at it yet", ask whether there is anything that needs clarifying.

Touch Three: *Help the Decision*

Address a question, provide relevant context or make the next step clear.

The objective is not to pressure somebody into a decision.

It is to remove unnecessary friction from making one.

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8. Build the 3-3-3 Rule Into Your Sales Process

Knowing the rule is useful.

Applying it consistently is where it becomes valuable.

If one person follows the 3-3-3 Rule brilliantly and everybody else follows up whenever they remember, the business still has an inconsistent sales process.

The aim is to make good follow-up repeatable.

Here's how...

1. Agree when the rule applies

Define the situations that trigger your 3-3-3 process.

For example:
- A qualified website enquiry.
- A first sales meeting.
- An event conversation where a follow-up was agreed.
- A proposal being issued.

Not every interaction needs the same treatment.
Agree which opportunities do.

2. Define what counts as a touch

Make sure everybody understands that three touches does not mean three identical emails.

Define the role of each interaction.

Touch One: Confirm.
Touch Two: Connect.
Touch Three: Add Value.

This gives the team a framework without forcing everybody to sound the same.

3. Agree ownership

Every opportunity should have somebody responsible for the next action.

If everyone assumes somebody else is following up, opportunities can easily be missed.

Make ownership visible.

- Who is responsible?
- What is the next action?
- When will it happen?

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Build the 3-3-3 Rule Into Your Sales Process Continued ....

4. Record what happened

Use your CRM or agreed sales system to record the interactions.

That allows you to see whether the process is actually being followed rather than assuming it is.

It also gives anybody else involved in the opportunity useful context.

5. Use templates as a starting point, not a substitute for thinking

Templates can create consistency.

They can also create terrible follow-up when people use them without adapting anything.

Build useful starting points for common situations, but leave space for personalisation.

Remember the principle from Touch One.

Include something that demonstrates you listened.

6. Review the process

Once the 3-3-3 Rule is being used consistently, review what you learn from it.

- Where do conversations tend to continue?
- Which channels are appropriate for your customers?
- Which types of follow-up create useful responses?
- Where does the process become difficult for the team to maintain?

The aim is not simply to count activity.
I
t is to improve the quality and consistency of your sales process.

CH4B Insight

Frameworks are most useful when they turn good intentions into repeatable action.
The 3-3-3 Rule gives your team a common starting point while still allowing every conversation to remain personal

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9. The 3-3-3 Sales Follow-Up Check

Use these questions to identify where your current approach could be strengthened.

Speed
- Do we respond promptly when somebody makes a genuine sales enquiry?
- Do we have a clear expectation for when the first follow-up should happen?
- Could opportunities currently be sitting unattended because nobody knows who owns them?

Consistency
- Does everybody involved in sales understand what good follow-up looks like?
- Would two members of the team handle the same type of enquiry in broadly the same way?
- Is our process written down or does it rely on individual habits?

Relevance
- Does our follow-up demonstrate that we listened?
- Are messages adapted to the prospect and their situation?
- Could somebody receive one of our follow-ups without having spoken to us and barely notice the difference?

Channels
- Do we rely almost entirely on email?
- Are we using other appropriate channels available to us?
- Does the channel reflect how the prospect has chosen to communicate?

Value
- Does each touch have a purpose?
- Are we giving prospects useful reasons to continue the conversation?
- How often do our follow-ups amount to little more than “just checking in”?

Accountability
- Does every active opportunity have a clear owner?
- Do we know what the next action is?
- Can we see whether the agreed follow-up actually happened?

If several answers are unclear, you do not necessarily need a more complicated sales system.

You may simply need a clearer process.

Start there.

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10. Final Thoughts

Following up should be one of the simplest parts of a sales process.

Yet in many businesses, it relies heavily on individual habits.

One person follows up immediately.
Another waits.
One calls.
Another sends an email.
Somebody sends useful information.
Somebody else writes "just checking in" for the third time.

None of those individual decisions necessarily looks significant.

Together, they create inconsistency.

The 3-3-3 Rule provides a simple alternative.

3 touches.
3 days.
3 different channels.

Touch one confirms.
Touch two connects.
Touch three adds value.

The aim is not to bombard prospects.

It is to create a clear, consistent approach that keeps promising conversations moving while making every interaction useful.

And the wider principle goes beyond sales follow-up.

When an important part of your business relies on memory, individual preference or good intentions, there is an opportunity to create greater clarity and structure.

So rather than asking:
"Did we follow that lead up?"

Ask:
"Do we have a process that makes good follow-up consistent?"

That is a much more useful question.

Because stronger businesses are not built on good intentions alone.

They are built by turning what works into repeatable action.

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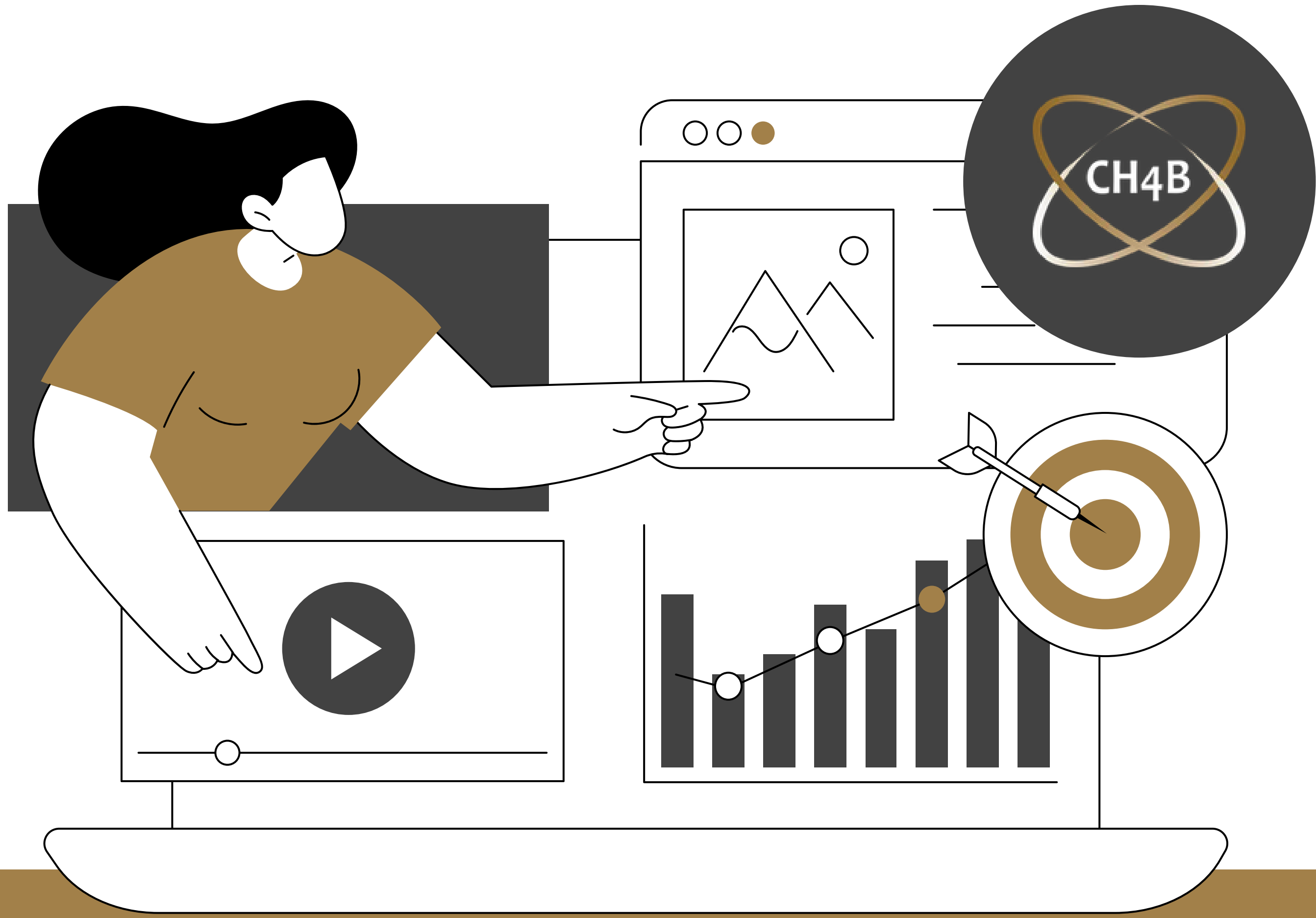

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Ready to take the next step?
The 3-3-3 Rule is one example of how greater clarity and structure can strengthen the way a business operates.

CH4B is a Business Progress Ecosystem that helps ambitious SME owners build stronger, more resilient and more valuable businesses through strategic guidance, practical frameworks, measurable accountability and connected expertise.

Want to identify what your business needs next? Speak with a Strategic Business Partner and start a conversation about where your next opportunity for Business Progress could be.

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