



Technician Follow-up Calls

Updated - July 2017

Context and Goals

- Follow up calls keep participants connected to the program and motivated to get certified.
- The expectation/goal is that each tech will dedicate 6-8 hours to follow-up, per 6mo contact.
- You will be calling participants who you visited 6mos to 1yr ago (note exceptions for new techs)

Just Five Simple Steps

1. Call each participant on your PressPoint list just once
2. **If someone answers**, example intro: *"Hello, my name is _____ with the Backyard Habitat Certification Program. We met when I did your Site Visit last July. I'm calling to check-in and see how you're coming along."*
 - a. Be positive and encouraging! Review the 5 elements of the certification criteria. Refer to the **Site Report**, Resource Packet, and the website - *Please avoid deferring questions back to Nikkie or Susie*
 - b. Ready to get certified? Send Nikkie an email asap - copy the participant on the email so they see the connection was made
3. **If no one answers**, please leave a message. Leave your own name/number.
4. Update the PressPoint record immediately
 - a. <Next follow-up> and <Next follow-up Year> → Add **THREE SEASONS**
i.e. Spring 2017 → Winter 2018
 - b. <Next Follow-up Assigned to> → DELETE your name, leave it blank
 - c. Make other updates as/if needed - i.e.
 - i. <Site Status> → "Inactive" or "Moved" if needed
 - ii. Check "invalid" phone number or "do not call" boxes if needed
 - d. Add a "Note" about the interaction
 - i. You no longer have to click on the history tab! Just click on the **Actions** dropdown in the upper right hand corner. Select "Note".
 - ii. Title = "Follow-up Note"
 - iii. Write a brief note, i.e. *Karen called. Spoke to Paul, still removing ivy*
5. Update the PressPoint records with new notes as participants respond to calls