

## Follow Up - Index Card System...

Items needed (All available at Staples)  
Details on [www.legalshieldteamct.com](http://www.legalshieldteamct.com)



**3 X 5** Index card box



**3 X 5** Index cards  
(lined)



**3 X 5** Index card tabs  
(blank)



## Follow Up - Index Card System...

Setting up your follow up box



What to write on the tabs:  
1-31 (Days of the month)

January – December  
(Long term follow up)

A – Z  
(new members and  
associates)



John Doe - 888.888.8888.com not call  
 Address: 8/14  
 Email: [redacted]  
 [8/12/22] met at networking event, Married  
 with 2 children. Have business cards  
 recommended website. Asked me to call  
 in 2 days

John Doe - 888.888.8888.com not call  
 Address: 14 8/14  
 Email: 13  
 11 12 10

John Doe - 888.888.8888.com not call  
 Address: 8/14 8/16  
 Email: [redacted]  
 [8/12/22] met at networking event, Married  
 with 2 children. Have business cards  
 recommended website. Asked me to call  
 in 2 days  
 9/14 - left voicemail (11am)

John Doe - 888.888.8888.com not call  
 Address: 14 15  
 Email: 16 not note 13  
 11 12 10