



Fiscal Year End To Do Checklist

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Update and verify the existing customer relationship management listing of all decision-makers in target agencies (annual turnover tracked at 43%).

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Identify additional targeted contacts through agencies' forecasts, web sites and SAM.gov

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Create a fiscal year-end offer to grab their attention.

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Update your company's social media platform and connect with all target agencies, bases and offices.

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Plan for a 24/7 customer service phone number ready to answer questions from July 1 through Sept. 30.

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Contact each decision-maker, ask for a briefing to update company offerings and discuss any open contracts for specific products or services.

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Ask to be notified of all fiscal year-end buying needs.

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Ask about any sales opportunities below the \$25,000 and \$150,000 thresholds.

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Ask permission to e-mail them information.

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Stay in touch via phone, e-mail, social media and direct mail every week through Sept. 30.
