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The SCORE Association
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Clients Not Yet Counseled – National Follow-Up Procedure

Part 1: CNYC +15 days

1) Pull the CNYC Report for each Chapter.
2) Send the below email to the assigned mentor for each client; if the MRE is unassigned, send it to the Chapter Admin or the Chapter Chair –

Hi [volunteerName],

*I hope this email finds you well. We would like to follow up with you regarding **[clientName, MRE-00######]** since their mentoring request has aged more than 15 days on the Clients Not Yet Counseled report. Please answer the following questions:*

1) Have you contacted or attempted to contact the client?

a. If not, why?

b. If so, how many times and what types of contact (phone, email, or video)?

2) If contacted, do you have an appointment scheduled with the client?

3) Have you already met with the client and just not entered session notes in CORE?

Please respond at your earliest convenience.

[Email signature]

1) Pull the CNYC Report for each Chapter.

2) Close out any client in CORE with an MRE creation date of 45 days or older.

3) Send a close out email to the client with instructions on how to request mentoring in the future if needed (see below).

Hi clientName,

Your request for a SCORE mentor has been closed. We are sorry that we were unable to reach you. SCORE is dedicated to making sure you receive the business advice that you deserve! Please see the following resources available on www.score.org below:

To submit a mentoring request to your local Chapter or to search for a SCORE mentor via mentoring method (face-to-face, email, phone, or video), please visit: https://www.score.org/find-mentor

To register for upcoming SCORE Live Webinars, or to view archived webinars, please visit: https://www.score.org/take-workshop

To contact your local SCORE office directly to schedule an appointment, please visit: https://www.score.org/content/find-location

We hope that you find these resources helpful!

If you would still like to be mentored in the future, please feel free to reach back out to me by replying to this email.

Sincerely,

[Email signature]