SALESPATH FREE RESOURCE

SalesPath

Quote cover-note template

Put this on top of every quote. It gives the buyer a reason to say yes, not just a number to compare.

Hi name,

Thanks for having us out to look at the job.

What you told us:

their problem, in their words, and why it matters to them

What we'll do:

the outcome, in plain English

Included:

the main items

Not included:

anything they might assume is in

Your options:

Option A, standard: $ price

Option B, premium: $ price

what's different

Why us:

one line of proof: a similar job, a review, your warranty

Next step: to go ahead, reply "yes" / sign / pay the deposit.

We can start date. This quote is valid until date.

Any questions, call me on number.

your name

Before you send

- [ ] Their problem is in their words
- [ ] Inclusions and exclusions are clear
- [ ] There are two options, not one
- [ ] There's one piece of proof
- [ ] There's one clear way to say yes
- [ ] It has a valid-until date
- [ ] It's going out within two business days
- [ ] Your first follow-up is in the diary

Why options help

With two options, the buyer's question becomes "which one?" instead of "yes or no?". Make the standard option the one you'd recommend for most buyers.

Keep it short

Half a page is plenty. The detail lives in the quote itself.