SalesPath

The Quote Follow-Up Kit

A 15-minute quote check, five follow-up templates and a simple tracker, built for owner-led service businesses whose quotes go quiet.

PART 1

Your three numbers

Pull your quotes from the last 90 days out of your job software, inbox or notebook. Rough numbers are fine.

Quotes sent	Quotes won	No answer at all	Win rate = won ÷ sent
_____	_____	_____	_____

If you can't get these in 15 minutes, that's your first fix: start logging every quote in the tracker this week.

PART 2

The 15-minute quote check

Answer honestly for how things actually run, not how they should run. Tick yes or no.

#	QUESTION	YES	NO
1	**Speed.** Do most quotes go out within two business days of the call or site visit?	☐	☐
2	**Reason to say yes.** Does every quote include a short note covering the problem, what's included and excluded, and why you?	☐	☐
3	**Next step.** Does every quote have one clear way to accept and a valid-until date?	☐	☐
4	**Follow-up.** Does every quote get at least three follow-ups before it's closed off?	☐	☐
5	**Qualifying.** Before quoting, do you ask about timing, budget, who decides and other quotes?	☐	☐
6	**Proof.** Do your quotes include photos of similar jobs, reviews, your guarantee, or options to choose from?	☐	☐
7	**Visibility.** Could you list every open quote and its next step right now, without searching your inbox?	☐	☐

Count your "No" answers. This is a rough guide, not a grade:

0–1
Your basics are in place. Use the tracker to find the next gain.

2–3
You're likely losing winnable work. Fix the first "No" on the list this week.

4 or more
Start with follow-up (question 4). It costs nothing, and the templates are on the next page.

PART 3

The five-step follow-up sequence

Every message has a reason other than "just checking in". Adjust the timing to how your buyers decide.

STEP	WHEN	HOW	PURPOSE
1	Same day	Text or email	Confirm it arrived
2	Day 2–3	Call, then text if no answer	Clear up questions
3	Day 7	Email or text	Help them decide
4	Day 14	Call or email	Keep it open, change it, or close it
5	Day 21 or expiry	Email	Close it off cleanly

The templates

Copy them, make them sound like you, and swap in the details in brackets.

STEP 1 · SAME DAY

Hi [Name], I've just sent through the quote for [job]. Have a look when you get a chance, and if anything doesn't make sense, reply here or give me a call on [number].

STEP 2 · DAY 2–3 · AFTER A CALL ATTEMPT

Hi [Name], [your name] from [business]. Just checking the quote for [job] made sense, and whether there's anything you'd like changed or explained before you decide.

STEP 3 · DAY 7

Hi [Name], following up on [job]. The main thing this fixes is [their problem, in their words]. If you're weighing up a few options, I'm happy to talk through the differences, or adjust the scope to suit your budget.

STEP 4 · DAY 14

Hi [Name], should I keep the quote for [job] open, change anything, or close it off for now? Any of those is fine. I just don't want to leave you hanging.

STEP 5 · EXPIRY

Hi [Name], I'll close the quote for [job] off for now. If timing changes, reply to this message and I'll reopen it or update the pricing.

When they say "it's too expensive"

- Don't discount straight away. Ask: "What are you comparing it with?"
- Check the scope. Are both quotes for the same job?
- Offer a choice (smaller scope, staged start, standard option) rather than the same job for less.
- If it's genuinely not a fit, let it go politely.

PART 4

Keep track: the quote tracker

The spreadsheet that comes with this kit does the counting for you. If you'd rather use your own, these are the columns that matter:

- Date sent
- Buyer and job
- Where the enquiry came from
- Value
- Status: open, won, lost or no answer
- Next step, and the date it's due
- Follow-ups sent
- Last contact
- Reason lost

Four rules that make it work

1. Every open quote has a next-step date.
2. Every message has a reason.
3. Log each message the day you send it.
4. Stop after the close-off message, and record why the quote was lost.

Reasons quotes are lost

Use the same handful every time, so patterns show up after a month or two:

REASON	WHAT TO LOOK AT
Price	Is the value clear? Did you offer options? Was it the right buyer?
No response	Follow-up cadence, next step and quote clarity
Timing	Set a date to check back in
Poor fit	Qualifying questions and where the enquiry came from
Competitor	Ask why: speed, proof or value?
Confusion	Quote wording, scope and how to accept

Every week, sort open quotes by next-step date. Any quote without a next step is one you've stopped working on.

WANT A SECOND PAIR OF EYES?

The Sales Conversion Review

I go through up to 20 of your recent enquiries and quotes, map where buyers drop off, and give you a practical 30-day fix plan.

- **$1,495 inc GST**, fixed fee, delivered in 7–10 business days
- **Three-leak guarantee:** if I can't find at least three clear, fixable leaks, you don't pay

salespath.com.au

Chris Edmund · SalesPath · Melbourne-based, working with owner-led businesses Australia-wide.