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FREE SCRIPTS

Quote follow-up scripts and tracker

Four short messages, the day to send each one, and a table to keep track of every open quote.

The schedule

Touch	When	Its one job
0. The quote	Same day as the visit or call	Make the next step obvious
1. Check-in	2–3 days after sending	Make sure it arrived and is clear
2. Something useful	About a week after sending	Remove a reason to wait
3. Date nudge	3–5 days before valid-until	Give a reason to decide now
4. Close the loop	Just after valid-until	Get a clear answer, leave the door open

Scripts

0. Sending the quote

> Hi [name], here is the quote for [job], as we discussed on [day]. The price holds until [date]. The one thing I need from you is [a yes / your preferred start week / which option you'd like]. Happy to talk it through by phone.

1. Check-in

> Hi [name], just checking the quote for [job] reached you and that everything on it makes sense. Is there anything you'd like me to explain or change?

2. Something useful

> Hi [name], a couple of people have asked me about [likely question], so I thought it worth saying: [answer]. If the full job is more than you want right now, [smaller option] would be [price].

3. Date nudge

> Hi [name], a quick reminder that the price on quote [number] holds until [date]. If you'd like me to keep [start week] for you, just reply yes and I'll send the deposit details.

4. Close the loop

> Hi [name], I'm closing quote [number] on my side as the date has passed. If you'd like to go ahead later, reply any time and I'll check prices and send a fresh one.

Open quotes tracker

Client	Quote no.	Sent	Valid until	1	2	3	4	Result

The full guide, with the video: fynl.io/blog/how-to-follow-up-on-a-quote/ Free estimate maker: fynl.io/free-estimate-maker