

NEXTLVL TOOLBOX

Quote Follow-Up System

A practical four-touch process, message library, pipeline stages and weekly review routine.

More jobs. Less admin. Smarter business.

The follow-up sequence

The objective is not to pressure the customer. It is to confirm delivery, answer questions and close the loop so the pipeline stays accurate.

When the quote is sent

Hi [First name], quote [number] has just been sent to [email]. Please check junk mail if needed. Reply here if you would like anything clarified.

Two business days later

Hi [First name], checking that quote [number] arrived safely. Do you have any questions about the scope or next step?

Seven days later

Hi [First name], following up on quote [number]. Would you like to proceed, adjust the scope or leave it for now? A quick update helps us plan our schedule.

Final close-the-loop message

Hi [First name], this is our final scheduled follow-up for quote [number]. We will mark it as not proceeding for now, but you are welcome to contact us if circumstances change.

Pipeline stages

Stage	Meaning	Required next action
New	Enquiry captured	Qualify and assign owner
Site visit	Inspection required	Book date
Quote preparing	Information complete	Send by promised date
Quote sent	Customer has quote	Schedule follow-up
Decision	Customer considering	Answer questions
Won	Approved	Book work and confirm
Lost	Not proceeding	Record reason
Nurture	Timing not right	Set a genuine future date

Weekly quote review

- List every open quote.
- Confirm each customer received it.
- Send only the next scheduled message.
- Record won, lost, nurture or no response.
- Record the genuine reason when known.