

The 7-minute quotation follow-up check

For busy independent tradespeople and service businesses. A free, practical routine to make sure promising quotations do not disappear under the day's admin.

Minute 1-2: identify the next action

Write down every quotation still awaiting a decision. Record: customer, service, amount (estimate), date sent and next follow-up date. Avoid creating a second record for the same opportunity.

Minute 3-5: send one useful message

Pick an appropriate message and personalise it. Check that contacting the recipient is appropriate; this is not a licence to send unsolicited marketing.

Draft A — confirm receipt

“Hi [name], just checking you received my quotation for [work]. Happy to answer any questions.”

Draft B — gentle next step

“Hi [name], are you still considering [work]? I can confirm availability or explain anything in the quote.”

Draft C — respectful close

“Hi [name], I'll close this quotation for now unless you'd like me to keep it open. You're welcome to come back whenever the time is right.”

Minute 6-7: log and schedule

Note what happened, then set the next date or close the enquiry. A quote without a next action has a greater chance of being forgotten.

Your five-quote action sheet

Print this page or use it as a quick weekly review. Record a specific next action and a follow-up date for each quotation.

Write down your five highest-priority quotations

CUSTOMER / WORK	EST. £	NEXT DATE	NEXT ACTION
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Three rules that prevent forgotten quotations

1. Every open quotation needs one named next action and a date. If you don't know when to follow up, decide before moving on.
2. Keep one record per opportunity from enquiry through quote, rather than counting the same job twice.
3. Close accepted or declined quotations honestly. The quoted value is an estimate, not confirmed payment.

Want an organised daily action queue?

SalesKit Digital currently sells a one-time £39 sales and follow-up toolkit. A more interactive offline command centre is being independently tested and is not yet included in that listing. Explore the currently listed product at payhip.com/b/yMXTN; check the live product description for exact contents before buying.

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