

Estimate Follow-Up Cadence Playbook

A free follow-up playbook for estimates, quotes, and consult-driven leads so small businesses stop letting warm opportunities go cold after the first reply.

Home-service teams, legal consult teams, clinics, and estimate-driven operators

GUIDE

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WHAT THIS ASSET COVERS

- A simple day-by-day follow-up cadence for estimates and consults
- A breakdown of when to use call, text, or email
- Messaging prompts for urgent, standard, and price-sensitive opportunities

USE THIS WHEN

1. Quotes are going out but close rates feel softer than they should
2. Your team follows up inconsistently or only when someone remembers
3. You need a cleaner post-estimate sequence before buying more traffic

WORKING ASSET

Use this playbook when quotes, consults, and estimates are going out but too many of them die quietly. Strong follow-up is not “checking in.” It is structured movement: confirming intent, reducing uncertainty, surfacing objections, and pushing the lead toward a real decision.

CHANNEL STRATEGY

Use channels by intent level, not by habit:

- Call: highest-intent opportunities, larger tickets, short buying windows, or emotional decisions

- Text: quick nudges, scheduling clarity, lightweight resurfacing, and speed-sensitive moments
- Email: value recap, proposal recap, financing detail, attachments, and slower-consideration decisions

Default rule:

- call when the lead looks warm
- text when you need a short step forward
- email when context matters

CADENCE

DAY 0

- send the quote or proposal
- confirm the next step explicitly
- make it easy to reply with a yes, no, or question

DAY 1

- short text or call
- confirm they received it
- remove uncertainty around scheduling, scope, or next step

DAY 3

- reframe value, not just price
- bring back the business reason the work matters now

DAY 6

- ask for the real objection
- force clarity around timing, budget, decision-maker, or trust

DAY 10

- send a calm close-the-loop message
- release the lead respectfully while keeping the door open

DECISION TREE

- If the lead responds positively: move to booking immediately

- If the lead responds with questions: treat it as active, not stalled
- If the lead says “thinking about it”: shorten the gap to the next touch
- If the lead goes silent: switch channel once before assuming the deal is cold
- If timing is the issue: set a date to re-open rather than letting it float

OBJECTION HANDLING

Most stalled estimates sit in one of these buckets:

- price shock
- no urgency
- unclear difference between options
- spouse or partner approval
- financing uncertainty
- trust or credibility hesitation

Your follow-up should identify which bucket is real instead of repeating “just checking in.”

SAMPLE LANGUAGE

VALUE REFRAME

Wanted to resurface this because the main issue was not just the project itself, it was [problem]. If you want, I can walk you through the fastest next step and what I would prioritize first.

OBJECTION PULL

Totally fine if the timing is not right. Usually when a quote goes quiet it comes down to timing, price, or another priority. Which one is most true on your side?

CLOSE-THE-LOOP

I will close the loop for now so we do not keep chasing you. If you want to reopen this later, just reply here and we can pick it up quickly.

WEEKLY REVIEW

Ask these every week:

- how many open estimates received the full cadence?
- which day had the highest reply rate?

- which objections show up most often?
- where are leads stalling after the first quote?
- what message actually moved decisions this week?

MANAGEMENT NOTES

Track follow-up quality by:

- estimates sent
- estimates touched on time
- response rate by channel
- objections surfaced
- close rate by estimator or advisor

If the team cannot answer those, follow-up is still memory-driven instead of system-driven.

OWNER CHECKLIST

Use this checklist before the document gets handed to staff. The goal is to turn Estimate Follow-Up Cadence into a live operating habit, not a file that sits in a folder.

- Name the single person who owns the workflow this asset touches.
- Pull one week of real evidence before changing anything: missed calls, form timestamps, chat transcripts, text threads, booking records, CRM notes, review requests, and staff handoff messages.
- Mark every request where the customer waited too long, repeated information, received a vague next step, or dropped before booking.
- Decide whether the issue is caused by unclear language, weak ownership, missing automation, poor routing, low trust, or a broken follow-up rhythm.
- Choose one workflow to fix first. Do not try to change phone, chat, forms, CRM, reviews, and reactivation all in the same week.
- Write the current rule in plain language. If the team cannot say the rule clearly, the customer will feel that confusion.
- Decide what good looks like. Use a response-time target, a handoff target, a booking target, or a review-request target.
- Review this asset every Friday until the workflow is stable for four straight weeks.

STAFF MEETING AGENDA

Use this agenda in a 25-minute meeting with the people who answer, route, book, follow up, or manage the customer relationship.

1. Open with the customer moment this asset is meant to improve.
2. Read one recent customer example out loud without blaming anyone on the team.
3. Ask where the current process made the customer's next step slower, less clear, or less trustworthy.
4. Review the checklist and remove any item that does not affect the customer journey.
5. Assign one owner for first response, one owner for booking or follow-up, and one owner for proof capture.
6. Decide which channel gets fixed first: phone, website form, chat, text, social message, CRM task, or review request.
7. Choose one script from this document and use it live for the next seven days.
8. Schedule the next review before the meeting ends.

COPY/PASTE SCRIPTS

Use these scripts as starting points. Replace the wording with the business name, service categories, market, office hours, and escalation rules.

Fast acknowledgement: Thanks for reaching out. I have your request and I am getting the right next step in motion now. I will confirm the details before anything is booked or assigned.

Missing information: I can help with that. To route this correctly, I need the service address or location, the best callback number, what is happening, and how urgent this feels today.

Qualified but not ready: That makes sense. I do not want this to get lost. I will save the details here and follow up at the time that makes the most sense for you.

Follow-up after silence: Just checking back so this does not sit unfinished. Do you still want help with this, or should we close the request for now?

Review request after successful work: Thank you for trusting us with the work. If the experience was smooth, a short Google review helps the next customer feel more confident choosing us.

Internal handoff: New request captured. Customer need, urgency, location, source, and next action are listed below. Please confirm ownership before the opportunity cools off.

INTAKE WORKSHEET

| Field | What to Capture | Why It Matters |

|---|---|---|

| Customer name | Full name and preferred contact method | Prevents duplicate records and weak callbacks |

| Source | Phone, website, chat, referral, Google, social, repeat customer | Shows which demand channels need better routing |

Urgency	Emergency, soon, flexible, research only	Controls response priority and staff escalation
Service need	Plain-language description from the customer	Helps staff avoid forcing the buyer into internal categories too early
Location	Address, city, service area, or remote context	Confirms fit before the team spends time on the wrong lead
Next step	Book, quote, call back, send info, waitlist, close	Prevents warm demand from sitting without ownership
Owner	Person responsible for the next action	Makes accountability visible
Follow-up date	Specific date and time	Turns intent into a calendar reality

METRIC TRACKER

Metric	Target	Review Rhythm	Owner
First response time	Under 5 minutes for web leads and under 4 rings for calls	Daily	Front-door owner
Qualified next step captured	90 percent or better	Weekly	Intake owner
Booking or follow-up assigned	100 percent	Weekly	Office lead
Missed inquiry recovery	Same day when possible	Weekly	Follow-up owner
Review or proof request sent after successful work	80 percent or better	Weekly	Reputation owner
Unowned open opportunities	Zero by Friday close	Weekly	Owner or manager

DECISION RULES

- If the request is urgent, route it before collecting nice-to-have details.
- If the buyer is comparison shopping, prioritize speed, proof, and a clear next step.
- If the lead is qualified but not ready, assign follow-up instead of letting the record sit open.
- If the customer repeats information twice, the handoff failed.
- If staff are rewriting the same explanation manually, turn the explanation into a script, snippet, or automation.
- If a review request depends on memory, the business does not have a review system yet.
- If the same problem appears across phone, chat, forms, and CRM, the business needs a system fix, not another reminder.

HANDOFF SOP

Use this SOP whenever a request moves from one person, channel, or system to another.

1. Confirm the customer identity and preferred contact method.
2. Summarize the need in one sentence a new team member can understand.

3. Label urgency without exaggerating.
4. Attach the source channel so reporting stays useful.
5. Record what the customer was promised.
6. Assign the next action to a named person or system.
7. Set a follow-up time.
8. Close the loop with the customer when the next action is complete.

A handoff is not complete when the note is written. It is complete when the next owner accepts responsibility and the customer knows what will happen next.

30-DAY ROLLOUT

Week 1: Audit the current workflow. Pull real examples and mark where response, routing, trust, booking, or follow-up breaks down.

Week 2: Test the working language. Use the scripts and worksheet on live customer requests. Keep the test narrow enough that the team can actually follow it.

Week 3: Add measurement. Review first response, qualified next step, booking assignment, follow-up completion, and proof capture. Fix the weakest metric first.

Week 4: Decide what should be systemized. If the workflow now works with manual ownership, keep it as an SOP. If it still depends on memory, install automation or move it into a managed AI Business Operating System.

IMPLEMENTATION NOTES

This asset is meant to be edited. Replace generic wording with the business name, service categories, staff roles, escalation rules, pricing boundaries, service-area rules, and follow-up timing. Keep the parts that make the team faster and remove anything that adds ceremony without improving the customer journey.

The best use of Estimate Follow-Up Cadence is not to make the business look organized on paper. The best use is to make the next customer easier to answer, easier to qualify, easier to book, easier to follow up with, and easier to turn into visible proof.

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Estimate Follow-Up Cadence Playbook" become shared but unmanaged work.

- Use it with home-service teams, legal consult teams, clinics, and estimate-driven operators in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

BEST DEPLOYMENT SEQUENCE

- Quotes are going out but close rates feel softer than they should
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WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A simple day-by-day follow-up cadence for estimates and consults, A breakdown of when to use call, text, or email, Messaging prompts for urgent, standard, and price-sensitive opportunities.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.