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

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.

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.

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
- Your team follows up inconsistently or only when someone remembers
- You need a cleaner post-estimate sequence before buying more traffic

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.