

Estimate Follow-Up Kit

A starter kit for businesses that already have estimates and consults in motion but need stronger follow-up, rescue language, and conversion discipline.

Owner-operators, office managers, estimators, and consult-driven teams

GUIDE

A starter kit for businesses that already have estimates and consults in motion but need stronger follow-up, rescue language, and conversion discipline.

WHAT THIS ASSET COVERS

- Estimate Follow-Up Cadence Playbook
- Cancellation Rescue Script Pack
- Booking Readiness Checklist for Small Businesses
- Website Conversion Audit Checklist for Small Businesses

SUGGESTED ROLLOUT

1. Standardize the post-estimate cadence instead of relying on memory.
2. Use rescue scripts when booked opportunities wobble or cancel.
3. Tighten the booking path so handoff into the calendar is cleaner.
4. Audit the website path so warm demand does not stall before follow-up starts.

WORKING ASSET

This kit helps businesses convert more of the opportunities already sitting in the pipeline.

INCLUDES

- Estimate Follow-Up Cadence Playbook
- Cancellation Rescue Script Pack

- Booking Readiness Checklist
- Website Conversion Audit Checklist

BEST USE

When quotes are being sent but too many leads stall before the sale.

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Estimate Follow-Up Kit" become shared but unmanaged work.
- Use it with owner-operators, office managers, estimators, and consult-driven teams 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.

30-DAY ROLLOUT SEQUENCE

- Standardize the post-estimate cadence instead of relying on memory.
- Use rescue scripts when booked opportunities wobble or cancel.
- Tighten the booking path so handoff into the calendar is cleaner.
- Audit the website path so warm demand does not stall before follow-up starts.

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: Estimate Follow-Up Cadence Playbook, Cancellation Rescue Script Pack, Booking Readiness Checklist for Small Businesses, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.