

For home services

The Estimate Follow-Up Playbook

Silence isn't a no.

Estimate

Furnace replacement

- Sent Monday
- Day 2: questions answered
- Day 5: date held
- **Approved**

The Estimate Follow-Up Playbook

Most estimates don't get a yes or a no. They get silence. The homeowner is busy, comparing prices, or waiting to talk it over. A short, friendly follow-up schedule keeps your quote in front of them, answers the questions they didn't ask, and wins jobs you've already done the work to quote.

One play at a time

Start with play 1. Each one is a small change to how you already work, not a new system.

Swap in your words

Words in braces, like {first} and {time}, are yours to fill in: the customer's first name, your open times, your link.

Track one number

Every play ends with the one number to watch. Check it before you start and again a month later.

Text people who said yes

Only text customers who agreed to get texts from you, and give them an easy way to stop. Email is fine for the rest.

What's inside

1	Send the quote the same day	1 text
2	Day 2: ask about questions	1 text
3	Day 5: offer to hold a date	1 text
4	Day 10: help them decide	1 text
5	Day 30: the last call	1 text
6	Answer "it's too expensive" without dropping your price	
7	Keep one list of every open quote	
+	Your follow-up schedule	to copy

Play 1

Send the quote the same day

A quote that arrives while the visit is fresh gets read.

Do this

1. Send it the same day as the visit, by text and email.
2. Recap the problem in one sentence.
3. Offer two or three options when it makes sense.

Text to send

Same day

Thanks for having me out today, {first}! Here's your estimate for {job}: {link}. Any questions, just text me here.

Track: Quotes sent the same day as the visit.

Play 2

Day 2: ask about questions

Most quotes don't get a yes or a no. They get silence. A friendly question gets the conversation going again.

Do this

1. Keep a list of open quotes.
2. On day 2, ask if they have questions.
3. Answer in plain words, not jargon.

Text to send

Day 2

Hi {first}, it's {name} from {company}. Any questions on the quote for {job}? Happy to walk through it.

Track: Quotes that get a reply after day 2.

Play 3

Day 5: offer to hold a date

A date on the calendar makes the decision feel real.

Do this

1. Mention when you could do the work.
2. Offer to hold that date for a day or two.
3. Keep it low-pressure.

Text to send

Day 5

Hi {first}, I have an opening on {date1} for your {job}. Want me to hold it for you until {hold until}?

Track: Quotes accepted after the day 5 note.

Play 4

Day 10: help them decide

People stall on big decisions. Something useful, like a simpler option or a payment plan, helps them move.

Do this

1. Ask if price or timing is what's holding them up.
2. Offer a simpler option, or a payment plan if you have one.
3. Share a photo of a similar job.

Text to send

Day 10

Hi {first}, I know it's a big decision. If it helps, I can put together a simpler option, or walk you through {payment options}. Just say the word.

Track: Quotes that change to a different option.

Play 5

Day 30: the last call

Some people are still deciding a month later. A final friendly note closes the loop and leaves the door open.

Do this

1. Send one short note.
2. Say you'll close the file, and that they can reply any time.
3. Then stop.

What to say

Day 30

Hi {first}, I'll close out your estimate for {job} this week. If you'd still like to go ahead, just reply and I'll get you on the schedule.

Email subject

Should I close out your estimate?

Track: Quotes won after the last call.

Play 6

Answer “it's too expensive” without dropping your price

A price worry is usually a value question. Answer it, then offer choices instead of a discount.

Do this

1. Thank them and ask what they're comparing with.
2. Explain what's included and how long it lasts.
3. Offer a good, better and best choice.

What to say

Say this · Too expensive

That's fair to ask. What does the other quote include? Ours covers {included}. If budget's the main thing, I can price a simpler option.

Track: Price worries that still turn into a job.

Play 7

Keep one list of every open quote

Follow-ups only happen if you can see what's open.

Do this

1. Keep one list: name, job, amount, date sent, next follow-up.
2. Check it every morning.
3. Mark each quote won, lost or still open.

No script needed for this one: it's a change to how you run things.

Track: Open quotes, and how many you win each month.

Copy this

Your follow-up schedule

Print it, or copy it into your calendar for every quote you send.

Same day: send the quote by text and email, with a one-line recap.

Day 2: ask if they have questions.

Day 5: offer a date, and hold it for a day or two.

Day 10: ask what's holding them up, and offer options.

Day 30: say you'll close the file, and leave the door open.

Your first week

Four things to do this week.

- ☐ List every open quote.
- ☐ Send the day 2 text to the newest ones.
- ☐ Send the day 30 note to the oldest.
- ☐ Start sending quotes the same day.

The plays at a glance, and what to track

#	Play	Track
1	Send the quote the same day	Quotes sent the same day as the visit.
2	Day 2: ask about questions	Quotes that get a reply after day 2.
3	Day 5: offer to hold a date	Quotes accepted after the day 5 note.
4	Day 10: help them decide	Quotes that change to a different option.
5	Day 30: the last call	Quotes won after the last call.
6	Answer “it’s too expensive” without dropping your price	Price worries that still turn into a job.
7	Keep one list of every open quote	Open quotes, and how many you win each month.

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