

## SMALL BUSINESS SALES

# Estimate Follow-Up Templates

A polite four-touch plan that keeps good estimates from getting lost.

**How to use this**

- 1 Send the estimate and the day 0 note together.
- 2 Personalize each message before sending.
- 3 Track every touch and stop at the right time.

**Follow-up schedule**

Count from the estimate date

| When   | Channel       | Goal               | What to send                        |
|--------|---------------|--------------------|-------------------------------------|
| Day 0  | Email         | Confirm delivery   | Estimate, scope and clear next step |
| Day 2  | Text          | Check receipt      | Short note with an easy question    |
| Day 5  | Email         | Remove uncertainty | Helpful answer and booking option   |
| Day 10 | Text or email | Close the loop     | Final check-in with no pressure     |

**Text 1: receipt check**

Hi [Name], this is [Your name]. I sent the estimate for [Job]. Did it come through clearly?

**Text 3: close the loop**

Hi [Name], one last check-in on [Job]. Should I keep the estimate open, or would you like me to close it for now?

**Text 2: quick question**

Hi [Name], any questions about the [Job] estimate for [Price]? I am happy to walk through the details.

**Stop rules**

- Stop when they reply.
- Stop when they book.
- Stop when they say no.
- Stop after day 10.

COPY, PERSONALIZE, SEND

## Email templates

### Day 0: your estimate

**Subject:** Your estimate for [Job]

Hi [Name],

Thanks for talking with me about [Job]. Your estimate is attached. The total is [Price], based on the scope we discussed.

Take a look and reply with any questions. If everything looks good, use the approval link in the estimate to get started.

Thanks,  
[Your name]

### Day 5: anything to clarify?

**Subject:** A quick check on [Job]

Hi [Name],

I wanted to check whether anything in the [Job] estimate needs more detail. The price is [Price], and I can explain the scope or timing by email or phone.

If you are ready, reply here and I will confirm the next available date.

Thanks,  
[Your name]

## Estimate tracker

Check the box after each touch

| Customer | Estimate date | Amount | Day 2                    | Day 5                    | Day 10                   | Result |
|----------|---------------|--------|--------------------------|--------------------------|--------------------------|--------|
|          |               | \$     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
|          |               | \$     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
|          |               | \$     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
|          |               | \$     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
|          |               | \$     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |



Invoicefy keeps estimates, invoices and reminders in one place.

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