

## QUOTE &amp; ESTIMATE FOLLOW-UP

# Your quotes aren't dying from "no." They're dying from *silence.*

A buyer who asked for a quote wanted the thing. Then they got busy. Many of those quotes are still winnable, and follow-up is usually what decides it. This kit is the system: a cadence, five templates you can copy, and a clear stopping point. Every touch has to give the buyer something (an answer, an option, an easy out); "just checking in" gives them nothing, and that's why it gets ignored. Already have a rhythm that works? Keep it and steal the templates.

## THE CADENCE

|         |                                                                                                                                                              |
|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DAY 0   | <b>Send the quote with an expiry date.</b> The expiry isn't pressure, it's the hook every later follow-up hangs on.                                          |
| DAY 2-3 | <b>The check-in.</b> Confirm it landed, ask if anything needs adjusting. You're opening a conversation, not demanding a decision.                            |
| DAY 7   | <b>The value nudge.</b> Bring news worth having: a start date you can hold, a lead time, a way to phase the work if the number was high.                     |
| DAY 14  | <b>Close the file.</b> Give them a graceful out and yourself an answer. It's the easiest one for a busy buyer to answer.                                     |
| DAY 30+ | <b>The revival list.</b> Quotes that went quiet aren't dead, they're dormant. Revisit them monthly; projects have a way of coming back around.               |
| ALWAYS  | <b>Track one number:</b> of every ten quotes you send, how many close? If you don't know your quote-to-close rate, you can't see what following up is worth. |

TEMPLATE 01 · DAY 2-3 · THE CHECK-IN

**Subject: Your quote for [project], quick question**

Hi [Name],

I sent your quote for [project] over on [day]. Wanted to make sure it landed, and ask: does the scope look right? If anything's off, tell me what and I'll rework it.

[Your name]

TEMPLATE 02 · DAY 7 · THE VALUE NUDGE

**Subject: A start date for [project]**

Hi [Name],

While your quote's been out, I checked our schedule. If you give the go-ahead by [date], we can start on [date] and be done by [date].

If it's price, scope, or timing holding things up, say the word and we'll talk it through.

[Your name]

TEMPLATE 03 · DAY 7, SERVICE VERSION · THE ESTIMATE NUDGE

**Subject: Your estimate for [the job]**

Hi [Name],

Following up on the estimate for [the job]. Two things worth knowing: our [month] schedule is filling up, and if the number came in higher than you'd planned, there's usually a way to phase the work.

Want me to walk you through the options?

[Your name]

TEMPLATE 04 · DAY 14 · CLOSE THE FILE

**Subject: Closing the file on [project]?**

Hi [Name],

I don't want to clutter your inbox. If the project's on hold or you've gone another direction, no hard feelings, just tell me and I'll close the file.

If it's still live, the quote stands until [expiry date] and we're ready when you are.

[Your name]

TEMPLATE 05 · DAY 30+ · THE REVIVAL

**Subject: Still need [project] done?**

Hi [Name],

Back in [month] we quoted [project] at [amount]. Jobs like that have a way of coming back around, so I wanted to check: is it still on your list?

If the scope or prices need refreshing, I'll update the quote. No charge, no obligation.

[Your name]

OR SKIP ALL OF THE ABOVE

# Never send another follow-up yourself.

## *That's Chase's job.*

Chase is an AI employee, an **AI Quote Hound**, built by oBoy.ai. He watches every open quote and estimate you've sent, runs this cadence (or yours) automatically in your voice, and unlike the rest of us he doesn't get busy, distracted, or awkward about the third follow-up. When a reply needs your judgment, he escalates instead of guessing. And every week he reports back: what he chased, what came back signed, what needs you.

### STEP 01 · FREE

#### A 15-minute call.

How many quotes you send, how many close, who follows up today. Enough to know if Chase is even worth it.

### STEP 02 · \$995, CREDITED

#### The assessment.

We size what follow-up is worth in your real, conservative numbers. Build with us and the \$995 is credited in full.

### STEP 03 · DAYS TO WEEKS

#### Chase clocks in.

Built around your quotes, your customers, your voice. You read a weekly report; Chase does the chasing.

## What are your open quotes worth?

Book a free 15-minute call: [calendar.app.google/MozCvDnCUK2CJFnM8](https://calendar.app.google/MozCvDnCUK2CJFnM8)

Or read more first: [oBoy.ai/employees/quote-hound](https://oBoy.ai/employees/quote-hound) · [bryan@oBoy.ai](mailto:bryan@oBoy.ai)