

Quote Follow-Up Checklist For Contractors

A simple daily checklist for home service businesses that want fewer sent estimates to go cold.

Daily Checklist

Done	Daily action
<input type="checkbox"/>	Open the estimate list before checking general email.
<input type="checkbox"/>	Filter for estimates with a follow-up date due today or earlier.
<input type="checkbox"/>	Call every estimate worth more than \$1,000 before noon.
<input type="checkbox"/>	Send a short email or SMS for smaller estimates.
<input type="checkbox"/>	Record the result: no answer, question, objection, booked, lost, or check back later.
<input type="checkbox"/>	Add the next follow-up date before closing the row.
<input type="checkbox"/>	Move won jobs to scheduling and review tracking.
<input type="checkbox"/>	Record lost jobs with a clear lost reason.

Recommended Follow-Up Cadence

Day	Follow-up
Day 1	Confirm the estimate was received and ask if anything is unclear.
Day 3	Ask whether there are questions about scope, timing, or options.
Day 7	Offer a simpler option or ask whether to keep the estimate open.
Day 14	Send a polite close-out unless the customer requested a later check-in.

Need the full tracker?

Local Service Follow-Up OS includes a blank workbook, filled example workbook, user guide, message scripts, and a daily dashboard for leads, estimates, invoices, reviews, and maintenance reminders.

Visit followupfoundry.co/contractor-follow-up/