Quote & Follow-Up Checklist

For local service businesses — cleaning, handyman and repairs, landscaping, pressure washing, mobile detailing, and anyone whose work starts with an enquiry and a price.

> Most enquiries are not lost to a competitor. They are lost in the gap between “I’ll get you a price” and “you’re booked in” — the part that usually runs on memory, between jobs, with dirty hands.
>
> Work down the list and tick what you already do consistently. The blanks are the map: the stage with the most of them is where the work is leaking, and that is the one to fix first.

1 Before any enquiry comes in

Set-up

- [ ] **Know what you sell and how you price it.** Your services written down, and the method you use to arrive at a price — hourly, per job, per square metre, per visit.
- [ ] **Set a response-time target.** Pick a number you can actually hit, on your worst week, and treat it as the standard rather than the ambition.
- [ ] **Write your quote message once.** A reusable message you adapt, rather than one typed from scratch every time.
- [ ] **Choose one place where leads live.** A notebook, a spreadsheet, a shared list — one place, not four. Every route in ends up there.

2 When a new enquiry arrives

Same day

- [ ] **Respond promptly.** Even a short acknowledgement, if the real answer needs longer.
- [ ] **Get the details you will need anyway.** Name, phone number, address, and what the job actually involves — access, size, condition, timing, photos if they help.
- [ ] **Give a precise next step.** Not “I’ll be in touch”, but what happens next and roughly when.

3 Sending the quote

Be specific

- [ ] **Explain the scope, the price and the next action.** What is included, what it costs, and what you need from them to proceed.
- [ ] **State deposit and payment expectations up front.** When payment is due and how it is taken, before it becomes an awkward conversation.
- [ ] **Offer one easy booking question.** A single, simple decision — “does Tuesday or Thursday suit you better?” — rather than an open invitation to think about it.

4 Following up

Twice, then stop

- [ ] **Follow up after 48 hours.** Short and useful. Offer to answer a question rather than asking for a decision.
- [ ] **One final check-in about a week later.** Then close it off in your list, so you know where it ended instead of letting it fade.

5 Keep track of every lead

One place

Five columns is enough. Print this page, or copy the headings into a spreadsheet.

Name	Service needed	Quote sent	Follow-up date	Status

Status: New · Quoted · Waiting · Booked · Not moving forward.

6 Once the job is booked

Finish it off

- [ ] **Send a confirmation.** Date, time, price and what you need from them on the day.
- [ ] **Send a reminder** before the appointment.
- [ ] **Say thank you, and ask for a review** while the job is still fresh in their mind.
- [ ] **Mark it complete in your list.** A lead that is never closed off is a lead you will chase twice.

What to do with the blanks

Start with the stage holding the most of them. The first two fixes in most of these lists — putting every enquiry in one place, and writing the first reply once so it can be reused — need no software and no spending.

If the checklist showed you the gap and you would rather not build the fix yourself, that is the kind of thing ESEE builds: quote intake, follow-up, scheduling and lead tracking, sized to the business rather than to the software. No pressure either way — the checklist is yours regardless.

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