SALES

FOLLOW UP ON ESTIMATES WITHOUT BEING A PEST

"Not yet" is rarely "no."

Many replacement quotes get one presentation and no second conversation. Give every open estimate an owner and a next step.

A SIMPLE CADENCE

- **Day 1:** Thank them and answer open questions.
- **Day 3:** Check whether anything changed.
- **Day 10:** Offer a second look or financing review.
- **Day 30:** Ask whether the project is still on the list.
- **Day 90:** Move to your seasonal outreach.

Log the reason each one stalled. After a few months the reasons will tell you what to fix in the presentation.

WHY GOOD ESTIMATES DIE QUIETLY

Most homeowners who ask for an estimate had a real reason to ask. Then the kids got sick, a spouse wanted to think about it, a check didn't arrive, or the system limped along another month. No one decided against you. They just stopped deciding.

Meanwhile, your salesperson moved on to fresh appointments, because that feels more productive. An open estimate quietly becomes an old one.

GIVE EVERY ESTIMATE AN OWNER

Decide who follows up. In some shops it's the salesperson, because the relationship is theirs. In others, an inside person does it, because salespeople are in the field and tend to chase the newest lead. Either works. What doesn't work is "whoever gets to it."

Log each estimate with the date, the amount, the options shown, the reason given and the next follow-up date.

SEND A STRONG RECAP THE SAME DAY

The presentation was clear in the moment. By the next day, the customer remembers a price and not much else. Send a written recap that includes:

- What you found, with photos
- The options, in plain language
- What's included: permits, warranty, removal, cleanup
- How long the job takes
- Who to call with questions

KNOW WHAT EACH CALL IS FOR

Each touch should offer something new. If every call is "just checking in," customers stop picking up.

- **Day 1:** Thank them and ask if anything was unclear.
- **Day 3:** Ask what questions came up, and offer to speak with whoever else is involved in the decision.
- **Day 10:** Offer a second look or a financing conversation.
- **Day 30:** Ask whether the project is still on the list.
- **Day 90:** Make it part of seasonal outreach.
- **Before the next peak season:** Reach out before their system gets tested.

LISTEN FOR THE REAL REASON

"I need to think about it" usually means something else. Try "Of course. What's the part you're still weighing?" Then be quiet and let them answer.

The usual answers are money, trust, timing and comparison. Each one has a different response. If it's money, look at other options. If it's trust, offer references or a second visit. If it's timing, set a date to come back. If they're comparing, help them compare apples to apples.

DON'T INVENT PRESSURE

If a price or a rebate really does expire, say so and put the date in writing. Don't make up a deadline. Customers talk to each other and leave reviews, and fake urgency is the fastest way to turn a slow yes into a firm no.

KNOW WHEN TO STOP

If someone asks you to stop, stop, and mark the record. Respect your calling rules for texts and calls. A polite last message works well: "I don't want to be a pest, so I'll close this out for now. If anything changes, I'm here." Some of your best late sales will come from that message.

REVIEW THE REASONS EVERY MONTH

After a few months you'll have real data. If most losses are about price, look at your options and financing. If many customers say they never heard back, you have a process problem. If one advisor's estimates stall far more often, go on a ride-along with them.

MEASURE

Track the share of estimates that receive every planned follow-up, the number recovered, the revenue recovered, and the average days to close. The field sales calculator shows what recovering even a small share of your open estimates could be worth.

Sources: Service ProCall program guidance.

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BEST PRACTICES: UNSOLD ESTIMATES

MAKE IT A HABIT

What good looks like

> Every open estimate has an owner, a next step and a date.

> A first follow-up within two days of the visit.

> Estimates reviewed weekly, oldest and largest first.

The habits

1. Leave every estimate in writing, with options and a monthly payment.
2. Call within 48 hours, and ask what questions came up, not whether they are ready.
3. Plan a short sequence: day 2, day 7, day 30, then seasonally.
4. Offer a second visit to answer questions for larger jobs.
5. Track why estimates are lost, and coach to the top reason.
6. Keep unsold estimates on the list for future outreach.

Signs it's time to get help

- Open estimates pile up with no next step.
- Techs are expected to follow up between jobs, and don't.
- You don't know your close rate on estimates older than a week.

Where we fit: Service ProCall can run estimate follow-up calls as part of a database campaign, so open quotes get a next step.

More on unsold estimates