

FREE RESOURCE / SALES & ESTIMATING

7-Day Estimate Follow-Up Guide

Two complete follow-up tracks: phone or email, plus a Gmail scheduling playbook.

The goal Make it easy for a prospect to decide or ask questions. A quiet customer is still awaiting a decision - not automatically a lost bid or a price objection.

Choose one primary contact method

PHONE TRACK	EMAIL TRACK
For customers who prefer a conversation. Call at appropriate local hours; leave a concise voicemail only when reasonable.	For customers who prefer written details. Use clear, individual emails; personalize each message before sending.
Use a Gmail Task or calendar reminder for every call.	Use Gmail templates, reminders or Schedule send for each follow-up.

The suggested seven-day cadence

WHEN	PURPOSE	PHONE ROUTE	EMAIL ROUTE
Day 0	Deliver the estimate	Email the estimate, then confirm preferred timing if needed.	Send estimate with scope and one next action.
Day 2	Confirm receipt	Brief call; ask if they received it.	Short receipt-check email.
Day 5	Clarify decisions	Ask about open questions or decision date.	Offer scope/timing clarification.
Day 7	Close the loop	Final courtesy call or voicemail.	Final polite note; no pressure.

Before you send the estimate

- Ask when a decision is expected; use that date if it differs from this sample cadence.
- Confirm phone or email preference and whether the customer wants follow-ups.
- Check that scope, exclusions, price, schedule assumptions and approval steps are clear.

Days are elapsed days, not a requirement to contact someone on a weekend. Move weekend or holiday follow-ups to an appropriate business day. Adapt for procurement rules and larger commercial bids.

PHONE FOLLOW-UP / READY-TO-USE SCRIPTS

Track A: Make the call

Use your normal conversational tone. Ask one useful question and leave space for an answer; do not read a full sales pitch.

DAY 0	Email the estimate first Optional 20-second call if that was agreed upon. "Hi [Name], I just sent over the estimate for [project]. It covers [main scope]. When do you think you may have a chance to review it? I can answer anything that is unclear."
DAY 2	Confirm they received it If they have not opened it, offer to resend. "Hi [Name], this is [Your Name] with [Company]. I wanted to confirm the estimate for [project] made it through. Did you get a chance to see it, or can I clarify something?" Voicemail (if appropriate): "Hi [Name], [Your Name] with [Company]. I am checking that you received the [project] estimate. Please call me at [number] if you have questions. Thanks."
DAY 5	Ask about what is holding up the decision Stay neutral; do not assume the price is the problem. "Hi [Name], I wanted to check whether you had questions about the materials, work included, or timing on the [project] estimate. Do you have a date in mind for making a decision?" Voicemail (if appropriate): "Hi [Name], it is [Your Name] at [Company]. Happy to clarify any scope or scheduling questions on the [project] estimate. You can reach me at [number]."
DAY 7	Close the loop respectfully Stop routine follow-ups unless they ask for more time. "Hi [Name], I do not want to keep interrupting you. I will leave the estimate with you for now. If the project is still on your list, feel free to reach out when the timing is right." Voicemail (if appropriate): "Hi [Name], [Your Name] with [Company]. I will leave the [project] estimate with you for now. If you want to revisit it or have questions, please call [number]. Thank you."

Immediately after each call

Record: answered / voicemail / no answer; the specific concern (if any); the agreed next action and date. If they requested a change, confirm the revision in writing. Avoid repeating calls on the same day just because nobody answered.

EMAIL FOLLOW-UP / COPY-READY MESSAGES

Track B: Send a concise email

Use a consistent subject line or reply to the original estimate thread when sending manually. Replace every bracketed field.

DAY 0 / SEND THE ESTIMATE Subject: Estimate for [project] - [Company]

Hi [Name],

Thanks for the opportunity to quote [project]. I have attached the estimate covering [key work]. Please review the included scope, exclusions and anticipated timing. If it looks good, the next step is [how to approve]. I am happy to answer questions.

Thanks, [Your Name]

DAY 2 / CONFIRM RECEIPT Subject: Checking on your [project] estimate

Hi [Name],

I wanted to make sure the estimate for [project] reached you. Was the scope clear, or is there anything you would like me to explain?

Thanks, [Your Name]

DAY 5 / HELP THEM DECIDE Subject: Any questions about the [project] proposal?

Hi [Name],

I am following up on the [project] estimate. If you are comparing approaches, I can clarify the materials, work included, exclusions or schedule. Is there a decision date you are working toward?

Thanks, [Your Name]

DAY 7 / CLOSE THE LOOP Subject: Leaving the [project] estimate with you

Hi [Name],

I have not heard back, so I will leave the estimate with you for now rather than keep checking in. If you would like to revisit the project or ask about the scope, just reply to this email.

Best, [Your Name]

Keep it personal Do not send every message simply because the dates are on the calendar. A reply, different decision date, opt-out, or approved job changes the plan.

GMAIL WALKTHROUGH / SET IT UP ON ESTIMATE DAY

Use Gmail without a paid CRM

Two simple setups: pre-schedule the emails, or schedule reminders so you can decide whether to call or write.

Option 1 / Schedule the follow-up emails on Day 0

- 1. Send the original estimate.** Attach the correct proposal and explain the next approval step. Note the customer's preferred channel and agreed decision date.
- 2. Compose the Day 2 follow-up.** In Gmail on a computer, select Compose. Address the email to the same customer and paste the personalized Day 2 message from page 3.
- 3. Choose Schedule send.** Click the small down arrow next to Send, then Schedule send. Choose the appropriate Day 2 date and local business-hour time.
- 4. Repeat for Days 5 and 7.** Create separate messages and schedule them if those touches fit the customer's agreed timeline. Adjust weekends, holidays and time zones.
- 5. Review before each scheduled send.** Open Inbox / Sent / Scheduled and check the latest customer contact. If they replied, approved, declined or asked for no follow-up, cancel any irrelevant scheduled messages.
- 6. Cancel or adjust when needed.** Open Scheduled, select the message and choose Cancel send. It returns to Drafts, where you can edit or reschedule it.

Critical limitation Gmail Schedule send delivers a prepared message at the selected time; it does not automatically interpret a customer reply and cancel later follow-ups. Check Scheduled regularly. Scheduled delivery can be a few minutes late.

Option 2 / Better control for phone follow-ups

After sending the estimate, open the message in Sent and select **Add to Tasks** (or More > Add to Tasks). Give the task a Day 2 date and time. When you check in, mark or update the next action for Day 5 or the actual decision date. This reminds you to review the thread before contacting anyone.

Save time with reusable Gmail templates

On a computer: **Settings > See all settings > Advanced > Templates > Enable > Save Changes**. Then Compose, enter a reusable message, open More (three dots) > Templates > Save draft as template. Insert it into future messages and personalize every bracketed field. Gmail templates are a desktop feature.

Gmail feature references: support.google.com/mail/answer/9214606 (Schedule send) | [/14864208](https://support.google.com/mail/answer/14864208) (Templates) | [/9920317](https://support.google.com/mail/answer/9920317) (Tasks). Feature labels may vary by account or device.

WORKSHEET / ESTIMATE FOLLOW-UP RECORD

Keep the promise - and track it

Use a single record for each estimate. Record what actually happened, rather than guessing why a prospect is quiet.

ESTIMATE DETAILS	YOUR ENTRY
Client / project	_____
Estimate sent / amount	_____
Preferred channel / best contact time	_____
Agreed decision date / next step	_____
Estimate approval method	_____

Contact log: one line for each touch

DATE	DAY	METHOD	RESULT / QUESTION	NEXT STEP & DATE
_____	0	Email	_____	_____
_____	2	Call / Email	_____	_____
_____	5	Call / Email	_____	_____
_____	7	Call / Email	_____	_____

How to respond when they reply

"We need more time." Ask for a reasonable decision date; adjust reminders instead of sending unrelated messages.

"The number is more than expected." Ask which outcome matters most. Offer a revised scope if appropriate, not an automatic price discount.

"What does the estimate include?" Clarify in writing. If scope changes, issue a documented revision.

"We went another direction." Thank them, mark Declined and stop the sequence.

"Please stop contacting me." Mark Do not contact and cancel scheduled messages and reminders.

Status and end-of-week review

Check one: ☐ Awaiting decision ☐ Needs clarification ☐ Approved ☐ Declined ☐ Do not contact

Before closing the week Confirm every active estimate has a real next action and date. Do not classify an unanswered estimate as lost solely because it is quiet.

Educational workflow examples only; not legal advice or a promise of sales. Follow applicable consent, privacy and communications rules, respect customer instructions, and adapt the cadence to each trade and procurement process.