MODULE 10: EMAIL, CRM AND FOLLOW-UP

Quote follow-up sequence

Lesson: The follow-up sequence after a quote · about 15 minutes

Write the sequence and templates you will use on every quote.

Your business (name, service, main city):

1. **Count the quotes you sent last year, how many booked, and how many went silent. Write your close rate.**

2. **Set the timing and channel for each of your five touches, adjusted for your typical buyer.**

3. **Write your Touch 2 check-in and Touch 3 add-value emails.**

4. **Write your closing message, including the date you will release the hold.**

5. **Review your quote template: does the price include every mandatory fee, and is HST shown clearly? Note any changes.**

Check: can you now

- Build a five-touch follow-up sequence that adds value at each step
- Write follow-up emails, including a closing message, that prompt a clear yes or no
- Keep urgency, discounts and quoted prices honest under Ontario and federal law

One change you will make this week