Your bonus pages to go with the quote follow up checklist: what to say, and a tracker you can print or copy into a spreadsheet.

What to say

Short examples to adapt. Use your own words, and change the details to suit.

The Day 2 call, if no date was agreed

“Hello [name], it's [your name] from [company]. I sent over our quotation for [what it's for] on [day], and I wanted to make sure it reached you and the right people have seen it.”

“Have you had a chance to look through it? Are there any questions I can answer for you?”

“I'd like to go through it with you properly, so nothing gets missed and you have everything you need. Would [day] at [time] work, for about 20 minutes on Teams?”

Then record the call and the date against the quote, and send the email below.

Email confirming the date to go through the quote

Subject: Our quote [ref]: [day] at [time]

Hi [name],

Thanks for your time today. As agreed, I'll call you on [day] at [time] to go through our quote [ref] for [what it's for].

If anyone else should join, such as one of your engineers or someone from purchasing, please let me know and I'll send them an invitation.

Kind regards,
[Your name]

The “shall I close the file?” email

Subject: Shall I close the file on quote [ref]?

Hi [name],

I've tried to catch you a few times about our quote [ref] for [what it's for]. I don't want to keep chasing if the timing isn't right, so could you let me know which of these fits best?

1. It's still live, we've just been busy. Please call me next week.
2. The order has gone elsewhere. (If so, I'd be grateful to know why, so we can do better next time.)
3. The project is on hold. Please get back in touch in a few months.

Kind regards,
[Your name]

Want someone to do this for you? We follow up every quote for our clients, in their company name, and keep going until there's an order or a reason why not. Book a free meeting at www.c3sales.co.uk or call +44 (0)1625 380820.

Quote follow up tracker

Print this page and keep it on your desk, or copy the columns into a spreadsheet. With the chance of winning filled in, it doubles as your weighted sales forecast.

Quote ref	Prospect or customer	Contact	Decision maker	Value	Sent	Review date	Expected decision	Chance %	Competitors	Next action and date	Outcome or lost reason

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You're welcome to share this with your team