FREE CHECKLIST

Stop losing orders you've already quoted for

The quote follow up checklist. A quote that nobody follows up is an order left on the table. Use this for every enquiry and quote, from the day it comes in to the day you receive a purchase order or find out why not.

STAGE 1
Before you quote

- [ ] Is this a live project with a firm requirement, or a budget enquiry?
- [ ] Is the budget in place and approved?
- [ ] What happens if they do nothing?
- [ ] If they already have a supplier, why would they change?
- [ ] Every quote has an owner, one person responsible for following it up

STAGE 2
Before it goes out

- [ ] We know who the decision maker is, and they will see the quote
- [ ] We know when they plan to place the order, and when they need delivery
- [ ] We've asked who else they're getting quotes from
- [ ] The quote shows a clear validity date, lead time and commercial terms
- [ ] It meets their specification and answers what they actually asked for
- [ ] It goes out when we said it would, or sooner
- [ ] It goes to the person who sent the enquiry and the decision maker, with a short covering email: what they asked for, what we're offering and why it meets their requirements
- [ ] The engineer who specifies it and the buyer who places the order have both seen it
- [ ] We've agreed a date and time to go through the quote with them

STAGE 3
Day 2, if no date was agreed

- [ ] If you didn't agree a date and time to go through the quote before it was sent, call two working days after it went out
- [ ] Check the quote arrived and reached the right person, and ask if they have any questions
- [ ] Agree a date and time to go through the quote with them, and record it against the quote

Every Friday: run through every open quote. Which ones haven't been followed up this week? Who are you calling on Monday?



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You're welcome to share this with your team

STAGE 4

On the date: go through the quote

- [ ] Go through it on the date agreed, by phone, Teams or a visit
- [ ] Check nothing has changed in their requirements or timescales
- [ ] Go through price, lead time and commercial terms, and answer any technical queries, involving your engineers if needed
- [ ] Listen for buying signals, and ask a test close question
- [ ] If price comes up, make sure you're being compared like for like before you discuss a discount
- [ ] Ask: “What would need to happen for you to place the order with us?”
- [ ] Agree the next step and date before you finish the call
- [ ] If they couldn't make it, rearrange straight away rather than waiting

STAGE 5

Keep following up

- [ ] Never “just checking in”. Every follow up should add value: an answer to a query, a technical point, a datasheet or a reference
- [ ] Follow up on the dates agreed, then regularly until it is decided or the quote expires
- [ ] After three tries with no reply, send a polite note asking whether to close the file. We'll email you example wording for this

STAGE 6

Before it expires

- [ ] Remind them of the validity date a week before it runs out
- [ ] Offer to extend or update the quote if they need more time
- [ ] Revised quotes get a revision number (Rev A, Rev B and so on), and are followed up the same way

STAGE 7

The outcome

- [ ] **Won:** acknowledge the purchase order, thank them, hand over to your project team with everything that was agreed, and ask who else in their business you should be talking to
- [ ] **Lost:** ask why, who won it and at what price, record it on your lost orders register, and ask to quote next time. Review your lost orders every quarter
- [ ] **No decision yet:** agree a new date to follow up, and keep it on your sales forecast, weighted by how likely it is

How did you score?

How many of the seven stages do you follow for every quote?

6 or 7: you're in good shape. Keep it up every week.

3 to 5: orders are slipping through the gaps.

0 to 2: you're leaving orders on the table. Let's talk.

Take the free scorecard

Book a free meeting

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