

QuoteChime · quote follow-up checklist

One page for checking facts, choosing the next action, and stopping when the answer is clear.

Before any follow-up

- ☐ **Check every channel.** Make sure the customer has not already replied, accepted, declined, or asked somebody else on the team a question.
- ☐ **Open the real quote.** Confirm recipient, quote number, scope, price, dates, validity terms, assumptions, and exclusions.
- ☐ **Check consent and context.** Stop after a decline or request not to be contacted. Use the business's proper process for disputes, safety issues, or regulated work.

Choose one useful reason to write

- ☐ **Receipt check:** confirm the quote arrived and opens correctly.
- ☐ **Clarification:** ask whether scope, timing, price, or options need explaining.
- ☐ **Decision:** ask whether to proceed, revise something, revisit later, or close.
- ☐ **Closeout:** say you will close the quote rather than keep chasing.

Do not manufacture urgency. Mention availability or expiry only when it is real and supported by the written quote or current schedule.

Before sending

- ☐ Replace every placeholder. Remove claims you cannot support. Check tone, recipient, attachments, and links.
- ☐ Make “no” an acceptable answer. Send through the normal business channel; QuoteChime drafts do not send automatically.

After sending

☐ OPEN ☐ WAITING ☐ WON ☐ LOST ☐ LATER ☐ CLOSED

Record the next action or final outcome. An open quote is pipeline, not revenue. Use a revisit date only when the customer chose one.

Free browser-private generator and one-time A\$3 / A\$7 / A\$19 packs: quotechime.pages.dev

No reply, booking, sale, payment, or revenue outcome is guaranteed. Review all facts and applicable communication rules.