

ONE ESTIMATE. ONE OWNER. A REAL NEXT STEP.

HVAC Estimate Follow-Up

Plan the sequence before you ask the software to repeat it.

BUSINESS / TEAM

WORKFLOW OWNER

REVIEW DATE

Use customer-agreed timing first. Fill these fields for your process, not a universal cadence.

1 Send the current estimate

Deliver the estimate and explain how to ask a question.

Keep: version, scope and sent date

Pause / stop: a scope revision needs review

WHEN

OWNER

CHANNEL

2 Check delivery, if uncertain

Confirm receipt or fix a delivery problem.

Keep: delivery outcome

Pause / stop: skip if receipt is already confirmed

WHEN

OWNER

CHANNEL

3 Ask what they need to decide

Use the agreed contact to understand the next obstacle.

Keep: reply, assigned owner and next action

Pause / stop: a reply arrives; assign the conversation

WHEN

OWNER

CHANNEL

4 End an unanswered sequence

Explain that follow-up is pausing.

Keep: outcome and closure date

Pause / stop: the documented final attempt is complete

WHEN

OWNER

CHANNEL

CHANNEL CHECK

Confirm permission and provider requirements before enabling automated messages.

A REPLY SHOULD CHANGE THE WORKFLOW.

What happens next?

Pause generic reminders. Give the conversation to the right person.

They ask you to contact them later

Stop the original sequence. Record the requested date and review permission.

OWNER

NEXT ACTION / REQUIRED RECORD

They want to move forward

Stop estimate reminders. Record acceptance and scheduling separately.

OWNER

NEXT ACTION / REQUIRED RECORD

They decline or ask you to stop

Close the sales follow-up. Record the outcome and apply the stop request.

OWNER

NEXT ACTION / REQUIRED RECORD

The estimate needs revising

Stop the old sequence. Record the current version and agree on a next contact.

OWNER

NEXT ACTION / REQUIRED RECORD

TEST THE WHOLE PATH

Use labeled test records. Keep test activity out of real sales reporting.

- | | |
|---|--|
| ☐ No reply reaches a real ending | ☐ Acceptance stops estimate chasing |
| ☐ A reply pauses the next reminder | ☐ Decline / opt-out stops follow-up |
| ☐ Later contact replaces old reminders | ☐ Revised estimate stops old sequence |

TEST EVIDENCE / FIRST THING TO FIX

Need help? Book a Lead Conversion Audit

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