Re-engage stalled quotes and cold estimates automatically

> *“We send out dozens of quotes and bids every month, but never have time to follow up before leads go cold.”*

Category: lead-management | **Setup Time:** ~20 minutes | **Estimated Hours Saved:** 5 hrs/week | **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Build a 48-hour automated quote revival sequence that detects unviewed or unaccepted proposals and sends a friendly, value-first follow-up via SMS and email. Most service bids are lost not on price, but because the customer got distracted or a faster competitor followed up first. Automating two timed touchpoints revives high-intent buyers without requiring your sales reps or field technicians to manually remember who to call.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **OpenPhone:** **(paid)**
- **Make:** **(Free Tier / Wholesale)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Tag Quotes as Sent in Your Billing or Estimating Tool**
   When an estimate is emailed to the client, record the timestamp and customer phone number into a central tracking table or CRM webhook.

2. **Create a 48-Hour Delay Trigger in Your Automation Engine**
   Set a timer in Make or Zapier to wait exactly 48 hours after quote delivery before evaluating client status.

3. **Filter for Unaccepted Proposals**
   Verify that the proposal status has not changed to 'Accepted', 'Paid', or 'Declined' before proceeding with the outreach step.

4. **Send a Single Clarification Follow-up via SMS**
   Deliver a short, personalized SMS: 'Hi [Name], just checking in on the estimate we sent over Tuesday for [Job]. Do you have any questions on the scope or timeline before we reserve crew slots?'

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Will automated quote follow-ups feel spammy to commercial clients?

A: No, because the message references the exact project name, comes from a real local number, and asks a genuine question about scope and timeline rather than applying aggressive sales pressure.

Q: How many automated follow-up messages should we send?

A: Two touchpoints maximum: one SMS at 48 hours and a brief email recap at day 5. If they do not respond, archive the quote to keep your pipeline clean.

Q: What if the customer replies directly to the SMS?

A: The text arrives in your business inbox (like OpenPhone or your shared email) so your dispatch or sales team can take over the conversation immediately.