

Keep the next step clear

A practical companion to your roofing estimate. Use the editable messages and tracker to keep open quotes from disappearing into a busy week.

Three files to start with

Roofing-Follow-Up-Messages.docx or .txt

Four post-quote emails with SMS alternatives, plus a separate new-inquiry bonus. Edit before sending.

Roofing-Quote-Tracker.xlsx

A blank working tracker and clearly fictional examples. It does not send messages or read your inbox.

Set up once

1. Save a private working copy of the tracker. Give access only to staff who need it.
2. Assign an owner for each quote and choose a daily review time.
3. Customize the messages, sender details and opt-out process.
4. Practice with a fictional record before adding customers.

Manual first

Your existing spreadsheet and messaging tools are enough. Zapier is optional. No customer-sending automation, text-message account or reply detector is included. The pack does not create leads or guarantee replies or jobs.

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Four useful check-ins

Start only after a real quote has been delivered. Record its sent date and reference. Do not send another delivery message just because you have started using the tracker.

Around day 2 · Receipt

Ask whether the quote arrived and invite a question.

Around day 5 · Scope

Offer to explain the materials, inclusions or options.

Around day 10 · Timing

Ask whether the customer's plans have changed.

Around day 14 · Close the loop

Stop routine follow-up. Leave the door open without assuming the job is lost.

These dates are a starting point, not a universal best practice. Use one suitable channel per touch and the customer's preferred channel. Their agreed timing takes priority. Move reviews to staffed days and send only in appropriate local hours. Do not send several missed messages at once.

Before every send

Read the latest email, text and call notes. Confirm the quote still applies, the recipient is correct, permission is appropriate and there is no reply or opt-out. Replace all bracketed fields. Never invent urgency, savings, discounts or availability.

Review first. Then act.

Open **Instructions** in the tracker and set the review date to today. Use **Quotes** for real work. **Examples** is separate and entirely fictional. Amber cells are editable; the last column calculates a review prompt, not permission to send.

A simple morning check

1. Check your inboxes, calls and staff updates first.
2. Update statuses and any contact opt-outs before filtering the sheet.
3. Filter Review to find due work and missing details. Check customer-local hours yourself.
4. Take one appropriate action. Record the date and outcome in Notes, then set the next action and date.

What each status means

Open: Quote sent and still under consideration.

Replied: Stop the generic sequence. A person owns the reply.

Hold: Wait for the agreed revisit date. Review before resuming.

Won / Lost: Stop sales follow-up. Keep job administration separate.

Stop: Routine sequence finished or stopped. No response is not a confirmed loss.

Opt-out: Stop the requested communications promptly and record suppression in your sending tools too.

Do not rely on one row

An opt-out can apply to the same contact across several quotes. Check all related records and channels; this workbook cannot match contacts automatically. Do not delete the only record of a suppression. Weekly, check open quotes with missing owners or next dates.

A nudge for your office

Setup recipe, not live-tested. No Zapier account was connected and no test email was sent for this pack. This recipe reminds your team to review the tracker. It does not inspect rows, detect replies or send customer follow-ups.

Schedule by Zapier → Gmail

1. Store your working tracker privately where its owner can open it by link.
2. In Zapier, check the account timezone. Create a Zap with Schedule by Zapier and the Every Day trigger. Choose a staffed morning time and turn weekend runs off if appropriate.
3. Add Gmail's Send Email action. Connect the office account and enter only your own verified office or owner inbox as the recipient.
4. Use the subject and body below. Test to that internal inbox, confirm the link opens, then publish. Observe the first scheduled run.

Subject: Review today's roofing quote follow-ups

Body: Open [Private tracker link]. Check replies and opt-outs first. Review due quotes, send only eligible messages, and log the outcome.

If the reminder does not arrive

Check Zap history, account connections, recipient and spam folder. Verify the account timezone. A scheduled run may not happen at the exact minute. Keep the manual routine running while you fix it. Never retry an uncertain customer send without checking sent history.

Zapier and email-provider plans, limits and charges can change. Review current plan details before enabling the recipe. No paid plan or SMS provider is included. This guide intentionally omits unattended customer sending.

Sources checked 17 October 2026: [Zapier schedule setup and timezone](#); [Gmail actions](#); [current plans](#).

Keep it personal and permitted

New inquiries are a different workflow

Use the separate new-inquiry bonus to acknowledge an inquiry before an estimate exists. Choose a staffed-hours or after-hours message that reflects your real availability. Stop generic inquiry messages once the person replies or books an inspection. Move into the quote workflow only after you actually send a quote.

Email and text basics

Rules depend on location, provider and message purpose. For U.S. commercial email, use accurate sender and subject details, a valid postal address, required advertising identification and a clear working opt-out. Do not assume every quote follow-up is an exempt transactional email.

For SMS, record the appropriate permission and its source before sending. A quote request or phone number does not by itself authorize an automated marketing-text sequence. Identify your business, include appropriate opt-out wording and honor ordinary “please stop” requests as well as keywords. Provider setup, registration and charges are separate.

Run one fictional walkthrough

- [] An Open record with complete fields and a past date prompts review.
- [] Replied and Hold do not continue the generic sequence.
- [] Won, Lost, Stop and Opt-out suppress routine follow-up.
- [] A missing owner, date or permission is flagged.
- [] Every placeholder is replaced, links open and the footer is present.
- [] Your office knows where replies and opt-outs are recorded.

Use the guide as an operating checklist, not a legal compliance guarantee. Check local requirements and your provider’s policies before adopting a sequence, especially automated texts.

Sources checked 17 October 2026: [FTC commercial email guidance](#); [Twilio messaging policy](#) (provider-specific).