

Shed Dealer Quote Follow-Up Playbook

FREE INDUSTRY PLAYBOOK | OCTOBER 2026

A practical resource for business owners. Adapt message templates to your staff, customers, availability and applicable laws.

1. Collect only the fields needed to quote

- Product type: portable shed, garage, workshop or another structure.
- Approximate width, length and intended use.
- General delivery ZIP or area, not a full home address before needed.
- Optional features, budget if the customer volunteers it and approximate project timing.
- Preferred contact channel, permission to follow up and assigned team member.

2. Define your quote stages

Use simple, consistent CRM stages: New inquiry Clarify needs Estimate in progress Estimate sent Consultation offered Appointment Order or deferred. Attach one next-step task to every active record.

- Record when the estimate was requested and actually sent.
- Flag quotes waiting on an internal price, build time or delivery check.
- Do not mark a proposal accepted until the customer confirms it.

3. Sample scripts that respect the buyer

- After estimate: I sent the [type/size] estimate. Would you like to walk through options, or are you still comparing project timelines?
- Appointment invite: We can review the available designs and delivery considerations together. Would a quick call or lot visit be useful?
- Last follow-up: Checking one final time about your building quote. No pressure if plans changed; I can close or defer your request.

Estimate clarification: Hi [first name], thanks for asking about a [shed type]. Would [size A] or [size B] be closer to your project? If you share your general delivery area, our team can explain the quoting steps.

4. Fourteen-day follow-up example

- Day 0: confirm the inquiry and ask missing essentials.
- Day 1: deliver the estimate or give an honest ETA.
- Day 3: answer specification questions and check if the estimate was understood.
- Day 7: offer a practical consultation if still relevant.
- Day 14: courteous final follow-up; stop at any opt-out or clear refusal.

5. Review the quote funnel

- Median estimate turnaround: from complete intake to sent estimate.
 - Quote-to-appointment rate = confirmed appointments / estimates sent 100.
 - Appointment attendance and verified sold quotes by location.
 - Verify delivery, permit, foundation, financing and pricing details before publishing them.
- Do not automate promises staff cannot keep.

YOUR NEXT STEP

Identify one lead follow-up bottleneck this week and assign a staff owner. If you want a written review of your current intake and booking process, visit:

www.upskillzsolutions.com/contact

More free resources: www.upskillzsolutions.com/resources

Educational material only. No guaranteed increase in leads, appointments or revenue.