FREE ONE-PAGE KIT

Test a quote follow-up tool before you pay for one

A quote follow-up tool nudges people who got a quote and went quiet. Before you pay, ask 11 questions, run 5 test quotes with your own email and phone, and try it in draft mode for 7 days.

1. Ask the maker (11 questions)

1. What does it cost each month, and is the price based on users, quotes, or messages?
2. How does it know a quote is open? Does it read my quote software, my email, or a sheet?
3. Does it send messages by itself, or does it write drafts for me to approve first?
4. How many follow-ups does it send, and how far apart? Can I change that?
5. Does it stop when the customer replies, books, or says no?
6. Which name, email or number does it send from?
7. Can I see every message it sent, with the date?
8. Can I change the words and the tone?
9. What happens when a customer says “it costs too much”? Who answers?
10. Which quote or job software does it connect to? Does each link cost extra?
11. Is there a contract? How do I cancel? Can I take my data with me?

2. Run 5 test quotes

Make test quotes that go to your own email and a friend's phone (ask your friend first). Use a made-up job.

1. Quote 1: do nothing. Does the first nudge arrive on the day you set?
2. Quote 2: reply to the nudge. Do the next nudges stop?
3. Quote 3: reply “no thanks.” Does it stop for good?
4. Quote 4: reply “Too expensive.” Does it hand off to you, or write something odd?
5. Quote 5: mark the job as won. Does it stop on its own?

3. Your 7-day trial plan

Day 1	On paper, list every open quote. Write the name, the date, the amount and the last time you talked.
Day 2	Ask the questions. Get the price in writing. Set the spacing and the words.
Day 3	Run the 5 test quotes.
Day 4	Turn it on in draft mode only. Nothing goes out until you read it.
Day 5	Approve and send 5 real nudges.
Day 6	Write down who replied and what they said. Note any message you would not send again.
Day 7	Count replies and jobs won from the nudges. Keep it, change it, or cancel.

4. Red flags: walk away if you see these

- It sends messages without letting you read them first.
- It keeps messaging someone who said no.
- You cannot see what it sent.
- It claims it “closes more jobs” but shows no source for the number.
- It cannot stop when a quote is marked won.
- A contract that starts before you have tested it.

Tools in our directory for this job

- Grok Bot Quote Chaser
- Quote Follow-Up Bot
- Plumber Follow-Up Bot
- Hatch
- Quote Request Kit
- Carrier Follow-Up Agent

Best lists: Follow-up bots for home services; Follow-up bots for insurance and advisors. All free kits: busyworkbots.com/test-kits/

Not sure which tool fits? Take the Free Busywork Audit or book a Free Profit Leak Check (TimeGentic runs BusyWorkBots, so this is our own service). We do not test every tool. Prices change; check each maker’s site.