



Day Seven WORKBOOK

Day 7:

Following Up to Convert More Quotes Into Sales

Why This Matters

Most electricians don't follow up after sending a quote. And most customers don't decide on the spot.

They forget. They get distracted. Or they're waiting on other quotes.

By following up consistently, you stay top of mind and increase the chances of getting the job—without having to drop your price or chase.

This is a vital part of the **Relationships (R)** and **Keep-in-Touch (K)** principles of the S.P.A.R.K.S Blueprint.

With a solid follow-up system, you:

- ✓ Turn more quotes into booked jobs
- ✓ Appear more professional and reliable
- Save time by avoiding endless chasing
- ✓ Take control of the customer journey





Step-by-Step Instructions

Step 1: Set Up a Simple Follow-Up Sequence

Use a 3–4 step automated email sequence (available inside your ToolBox dashboard) or reminders for manual follow-up.

Suggested Email Flow:

Email 1	Day 1	"Did you receive everything okay with the quote?"
Email 2	Day 3	"Have you had a chance to review it?"
Email 3	Day 7	"Let me know if you have any questions—happy to talk you through it."
Email 4	Day 14	"Reminder—the quote is valid for 30 days. Let's chat if you're ready."

Tip: All emails stop once they respond—this isn't pressure, it's polite professionalism.

Step 2: Add Phone Follow-Ups If Needed

Set a reminder in your diary or CRM to follow up with a call for bigger jobs.

Example: "Hi, just touching base to check if you had any questions about the quote I sent over last week."

Write your own reminder message here:				





Step 3: Track & Improve

Use the SBD (Sparks Business Dashboard) or your ToolBox CRM to tag lead:	s as:
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- o Quote Sent
- o Follow-Up In Progress
- o Won
- o Lost

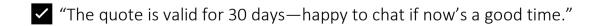
Over time, this will show your conversion rate—and how follow-ups impact results.

Follow-Up System Summary
My Follow-Up Method Will Be:
☐ Manual Emails
☐ Automated Emails via SBD
☐ Phone Reminders
☐ Text Reminders
Quote Follow-Up Timing
Day 1:
Day 3:
Day 7:
Day 14:
What I'll Improve About My Current Follow-Up Process:



**TASK: Build or Activate Your Follow-Up System

What % of quotes have I been losing through silence or forgetfulness?
"Probably 30–40%—and I never followed up."
➤ How will I make follow-up automatic so I don't forget?
"Use the built-in SBD follow-up sequence to do it for me."
➤ How will I track results going forward?
"Tag each contact in my CRM so I know what's working."
Examples of Follow-Up Messaging
✓ "Just checking in—did you have any trouble opening the quote?"
"Let me know if there's anything I can clarify. No pressure—I'm here when



you're ready."



Questions I Need to Ask Myself
➤ Am I sending quotes and then hoping they come back to me?
Would I follow up faster if the system did it for me?
What's my conversion rate—and how can I improve it?







Questions I Should Ask in the ToolBox

(Write your own below — these are just examples)

- o How are others automating follow-up using the CRM?
- o What subject lines or messages are working best? o Is it better to follow up by email, text, or phone?

♠ Common Mistakes to Avoid

- X Sending quotes and never following up
- X Assuming silence means "no"
- X Following up too aggressively or too late
- X Forgetting to track who you've contacted and when





Notes & Takeaways		

- **目** ToolBox Resources
- ✓ Quote Follow-Up Email Templates
- ✓ CRM Follow-Up Automation Guide
- ✓ <u>Facebook Members Group</u> Share Your Follow-Up Flow for Feedback





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