



PLAYBOOK

39 Estimate Follow-up Message Templates

To increase your close rates

Introduction

For home service businesses, there's one thing that drives close rates more than anything else: The way you do your sales follow-up.

That is, not just how many times you follow up, but also what you say in your messages.

We've been working with home service businesses for a while now, and have come to understand what works best in getting quoted prospects to respond **and** sign on with you. This guide has 39 sales follow-up messaging templates that we've collected from real campaigns that you can use for text and email to improve your close rates.

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Notes on these templates:

- Note that these templates are formatted for the Hatch platform. Anything in double brackets will automatically populate in Hatch.
This includes:
 - [[Contact First Name]] = the lead or customer's first name
 - [[User First Name]] = the first name of the Hatch user
 - [[User Email]] = the Hatch user's email address
 - [[Details Company Name]] = your company name
- If you aren't a Hatch user, you'll have to populate all bracketed content manually, single and double.
- Note also that this is just suggested copy. Be sure to adjust the messaging to match the language you use, the tone of voice you speak in, and the value propositions that are true about your business.

Estimate follow-up campaign template #1

This template addresses the quote directly.

Day 1 text	<p>10:00am Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. Do you have any questions on the estimate we sent over? Reply END to stop texts.</p>
Day 1 email	<p>10:30am Subject line: [[Contact First Name]], how can I help? Hi [[Contact First Name]],</p> <p>[[User First Name]] here with [[Details Company Name]]. It was great to meet you in our recent appointment, thanks for giving us the opportunity to earn your business! Do you have any questions on the estimate we sent over?</p> <p>[[User First Name]] [[User Last Name]] [[Details Company Name]]</p>
Day 1 voicemail	Optional voicemail
Day 2	Skip
Day 3 text	<p>10:30am Hey [[Contact First Name]], let me know if you have everything you need to make an informed decision.</p>
Day 4 text	<p>10:00am Hey [[Contact First Name]], [[User First Name]] again, checking in on your estimate. I'm happy to talk through any questions or concerns you have—let me know how I can help!</p>
Day 4 email	<p>10:15am Subject line: Your estimate with [[Details Company Name]]</p> <p>Hi [[Contact First Name]],</p> <p>It's [[User First Name]] again from [[Details Company Name]]. I haven't heard from you since we provided your estimate. Is it for any of these reasons?</p> <ol style="list-style-type: none"> 1. Price too high 2. Not ready 3. Considering someone else

	<p>I'm happy to work with you on any of these—we want to earn your business!</p> <p>Thank you,</p> <p>[[User First Name]] [[User Last Name]] [[Details Company Name]]</p>
Day 5 text	<p>11:00am</p> <p>Is your project still on the table, [[Contact First Name]]?</p>
Day 7 text	<p>10:45am</p> <p>Hi [[Contact First Name]], are you still looking to get your project done soon, or should I touch base in a few months?</p>
Day 7 voicemail	Optional voicemail

Estimate follow-up campaign template #2: Feedback approach

This template focuses more on the appointment itself, rather than the quote.

Day 1 text	<p>10:00am</p> <p>Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. I want to follow up on your recent appointment. How did everything go? Reply END to stop texts.</p>
Day 1 email	<p>10:30am</p> <p>SL: [[Contact First Name]], how'd it go?</p> <p>Hi [[Contact First Name]],</p> <p>[[User First Name]] here from [[Details Company Name]]. Thanks for having us out! How did everything go during your visit?</p> <p>Do you have any feedback or questions I can help answer?</p> <p>Best,</p> <p>[[User First Name]] [[User Last Name]] [[Details Company Name]]</p>
Day 1 voicemail	Optional voicemail

Day 2 text	Hey [[Contact First Name]], checking in again to see how your appointment went. Do you have any questions or feedback?
Day 4 text	10:00am Hi [[Contact First Name]], I just want to make sure we met your expectations. A yes or no is perfectly fine!
Day 4 email	10:15am SL: [[Contact First Name]], [[Details Company Name]] Feedback Hi [[Contact First Name]], It's [[User First Name]] at [[Details Company Name]]. Typically, people don't get back to us for one of the below reasons: 1. Too busy (understandable!) 2. Affordability 3. Something didn't go well at your appointment I'm happy to work with you to better understand what it will take to earn your business. Is one of the above affecting your response ? Thank you, [[User First Name]] [[User Last Name]] [[Details Company Name]]
Day 5 text	11:00am Is your project still on the table, [[Contact First Name]]?
Day 7 text	10:45am Hi [[Contact First Name]], are you still looking to get your project done soon, or should I touch base in a few months?
Day 7 voicemail	Optional voicemail

Tips on estimate follow-up











Before we dive into the templates, let's review some important tips.

Reach out multiple times

First, if you're only following up once or twice, you're leaving revenue on the table. It takes [5-12 touchpoints](#) to close a sale, but the average sales rep only follows up once or twice. After all, there's only so much time in a day.

That's why we have built-in Campaign templates in Hatch that automatically reach out multiple times, across multiple channels, over multiple days, to increase your chances of getting a response.

Use them! You can customize the messaging and add or remove messages, but the key is to maintain multi-touch communication.

Example appointment follow-up sequence										
DAY 1 DAY AFTER APPOINTMENT	DAY 2	DAY 3	DAY 4	DAY 5	DAY 6	DAY 7	DAY 8	DAY 9	DAY 10	DAY 11
	Pause		Pause		Pause					
										

Include an opt-out instruction in your first message

As a part of 10DLC and TCPA compliance, the first text for any campaign must contain a clear instruction on how to opt out of text communication.

That means telling them which word to respond with if they want to opt out, and making sure that word is in all caps.

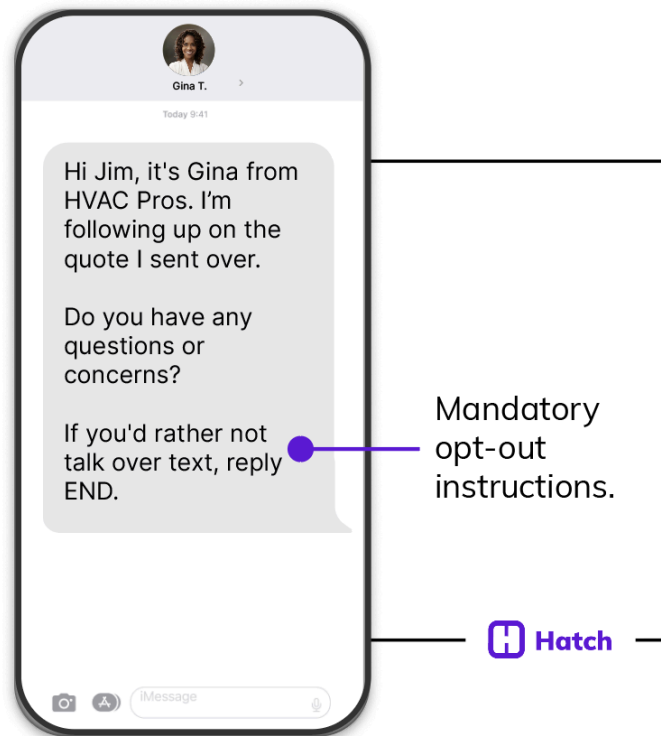
Your opt-out word must be one of the following:

- STOP
- STOPALL
- CANCEL
- END
- QUIT

We recommend "If you'd rather not talk via text, reply END." But other statements work too, like:

- Reply STOP to unsubscribe.
- Text QUIT to stop text communication.

You can learn more about this in our [guide to business texting](#).



Include a company identifier in your first message

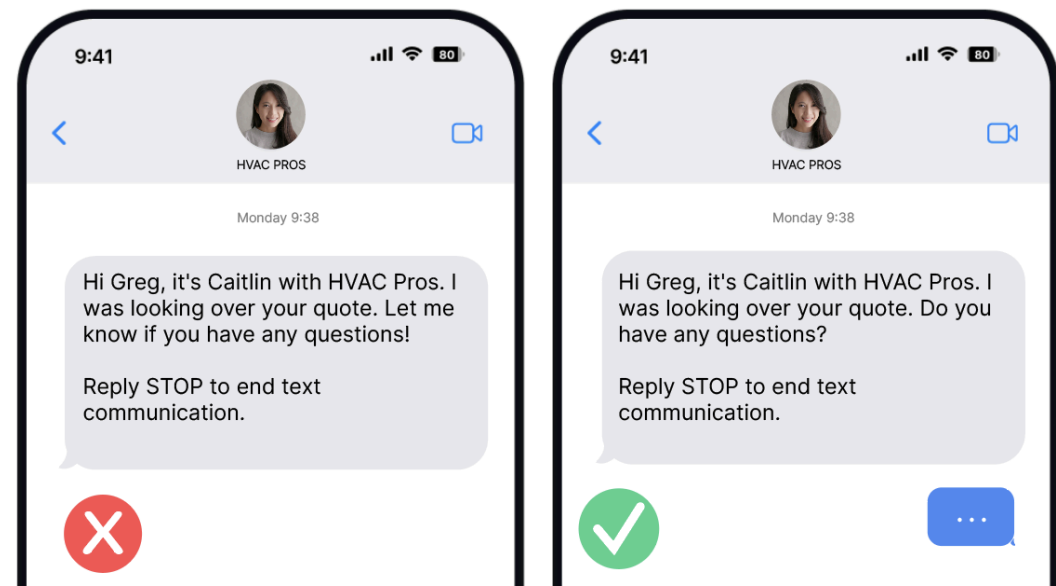
Another 10DLC compliance requirement is that the first text in a campaign must disclose the company's name. So after you say "Hi [[Contact First Name]]," anything along these lines will work:

- This is [[User First Name]] with [[Details Company Name]]
- This is the [[Details Company Name]] Team
- [[Details Company Name]] here

Those are just different ways to word the message. You can word it how you want, as long as [[Details Company Name]] is in there.

Invite a response

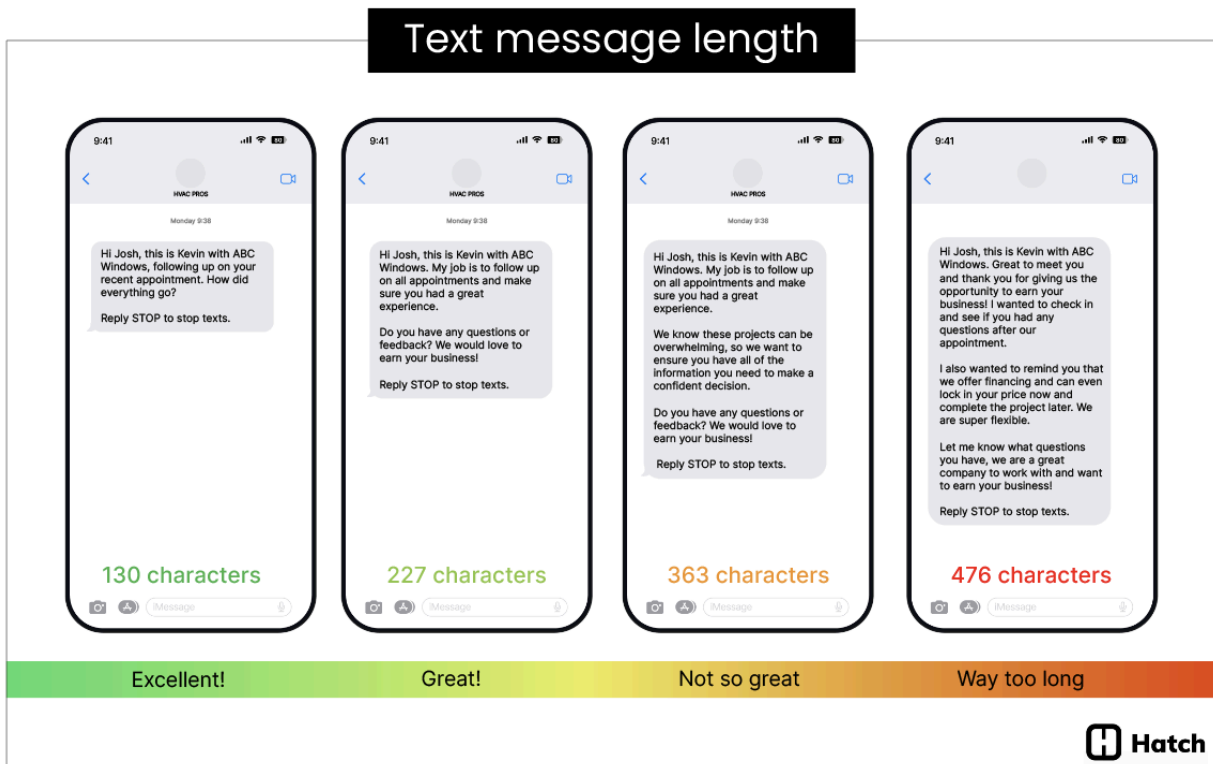
End your message with a question, request, or call to action, as this invites a response from the reader.



Keep your messages short

Too much information will burden your contacts and deter them from responding. Keep it short and sweet so they can easily digest the message and respond.

We recommend 160-180 characters. This can be difficult with the required compliance verbiage, so aim for no more than 220 characters.



Give Hatch AI a try

If you haven't started using Hatch AI already, give it a shot! Hatch allows you to put personalized estimate follow-up on autopilot so you never let another deal fall through the cracks. And with custom AI agents that converse with contacts for you, you can satisfy customers and close more deals in a fraction of the time. Not sure how you feel about AI talking to your leads? [Give our AI a test drive!](#)

Experience Hatch AI from your customers' perspective

Try our interactive AI demo now!

[TRY HATCH AI](#)

Other ways to word the first text

There is flexibility with the verbiage you use in your messaging. Here are some variations you can use for the first text in your campaign. As a reminder, the first message in a new campaign must include an opt-out option.

- Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. I was looking at your quote and wanted to see if you had come to a decision. Do you have any questions? Reply END to stop texts.
- Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. I was looking at your quote, I wanted to see if you had any questions. Any reason to not move forward? Reply END to stop texts.
- Hi [[Contact First Name]], [[User First Name]] with [[Details Company Name]] here. Thanks for chatting with me earlier this week. I wanted to follow up on our conversation and answer any questions you may have. More than happy to be an advisor for you as you plan your project. Reply END to stop texts.
- Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. I see you had a consultation recently—did we meet all your needs and requirements? Reply END to stop texts.
- Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. I saw you had a consultation recently - how are things progressing? Any questions for me? Reply END to stop texts.
- Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. My job is to follow up on all appointments to make sure you had a great experience. Did everything go well? Reply END to stop texts.
- Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. I want to follow up on your recent appointment. How did everything go? Reply END to stop texts.
- Hi [[Contact First Name]]! This is [[User First Name]] with [[Details Company Name]]. We recently came out for an appointment and left behind some options. Do you have any questions I can answer? Reply END to stop texts.

Other ways to word the first email

- **Subject line:** [[Contact First Name]], how can I help?

[[Contact First Name]],

I was looking at your quote and I want to make sure you get all your questions answered as you make a decision. How can I help?

Thank you,

[[User First Name]] [[User Last Name]]
[[Details Company Name]]
[[User Phone Number]]

- **Subject line: [[Details Company Name]] | [[Contact First Name]], I hope I can help!**

[[Contact First Name]],

I was looking at your quote, I just wanted to know if there is any reason you might NOT move forward or if I can answer any questions?

Thank you,
[[User First Name]] [[User Last Name]]
[[Details Company Name]]
[[User Phone Number]]

- **Subject line: [[User First Name]], how can I help?**

Hi [[Contact First Name]],

This is [[User First Name]] with [[Details Company Name]]. My job is to follow up on all appointments to make sure you had a great experience. Email me back with any questions, we would love to earn your business!

Thank you,

[[User First Name]] [[User Last Name]]
[[Details Company Name]]
[[User Phone Number]]

- **Subject line: [[Contact First Name]], how'd it go?**

[[Contact First Name]],

I'm hoping you can provide some feedback on your recent appointment with [[Details Company Name]]. How did everything go during your visit? Are there any questions I can help answer?

Best,

[[User First Name]] [[User Last Name]]
[[Details Company Name]]
[[User Phone Number]]

Other ways to word the follow-up messages (after no response)

As we mentioned above, reaching out once or twice is not enough when you're doing sales follow-up. Use these templates to continue reaching out, in the days that follow, until you get a response.

Texts

- Hey [[Contact First Name]], this is [[User First Name]] with [[Details Company Name]] again. Do you have everything you need to make a decision?
- Hey [[Contact First Name]], reaching out about your estimate. Let us know how we can help—we want to earn your business!
- Hey again [[Contact First Name]], checking in to see if your project is still on the table. Is there anything holding you back from making a decision?
- Hi [[Contact First Name]] - Curious, what's holding you back from making a decision?
- Hey there [[Contact First Name]], is your project still on the table?
- Hi [[Contact First Name]], are you still looking to get your project done soon, or should I touch base in a few months?
- Hi [[Contact First Name]] - I see you haven't moved forward with us. Let me know if the timing isn't right or how I can help.
- It's [[User First Name]] at [[Details Company Name]]. I'm reaching out to see if your project is still on the table. Was it the price? If so, I might be able to help!

- Hi! It's [[User First Name]] at [[Details Company Name]] again! Are you still interested? Text me and let me know. Thanks!
- [[Contact First Name]], this is [[User First Name]], the Sales Manager with [[Details Company Name]]. I wanted to get involved and earn your business, will a discount help? Hope I can help!
- Hi [[Contact First Name]], it's [[User First Name]] at [[Details Company Name]], reaching out one last time. Are you still interested? Let me know either way and I can close this follow-up out. Thank you!

Emails

Note that you can use any of the text templates above in your subsequent emails.

- **Subject line: [[Details Company Name]] | [[Contact First Name]] - Is it the price?**

Hi [[Contact First Name]],

It's [[User First Name]] at [[Details Company Name]]. There are a few reasons why people typically don't move forward:

- 1) Affordability
- 2) Not enough information
- 3) Product offering

I'm happy to work with you to better understand what it will take to earn your business. Is one of the above affecting your decision?

Thank you,

[[User First Name]] [[User Last Name]]
 [[Details Company Name]]
 [[User Phone Number]]

Start using these templates now

These tips and templates are proven to increase response rates. Customize them to your liking and use them to start turning more appointments into sales!



Satisfy and scale with Hatch AI

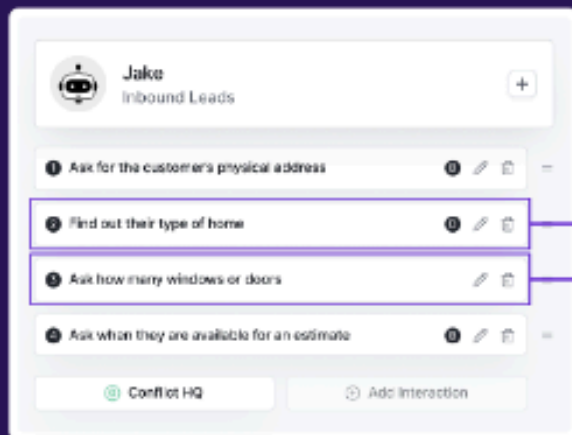
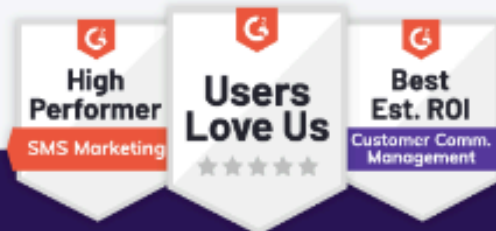
Train and control AI bots unlike any other tool in the market—to qualify leads, book appointments, and generate pipeline for you to close. With Hatch AI, unlock the power to increase set, close, and retention rates in 67% less time.

BOOK A DEMO

TRY HATCH AI

Get a tour of the platform

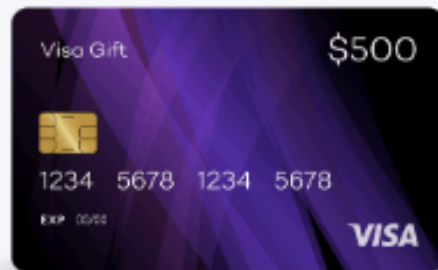
Try Hatch AI for yourself



Get \$500 for every customer you refer!

Here's how our referral program works:

1. Sign up with your name & email
2. Share Hatch with friends
3. Get a \$500 Visa gift card via email for every customer that stays with us for 90 days



[SIGN UP & START REFERRING](#)

You don't have to be a Hatch customer to refer someone!