THE QUIET PROTOCOL
AI SYSTEMS & AUTOMATION

Estimate Follow-Up Cadence Playbook

A permission-aware estimate follow-up register and message pack that stops on reply, acceptance, decline or opt-out.

Home-service teams, legal consult teams, clinics, and estimate-driven operators

GUIDE

Use a follow-up register to continue an estimate conversation at the buyer's chosen pace. There is no universal day-by-day cadence: the right next contact depends on the service, buyer's review process, permission and outstanding question.

ESTIMATE REGISTER

Estimate reference and version: [ ]. Scope and options quoted: [ ]. Sent date: [ ]. Recipient: [ ]. Contact channel agreed: [ ]. Buyer review date, if stated: [ ]. Open question: [ ]. Next action owner: [ ]. Agreed contact date: [ ]. Status: open, question received, revised, accepted, declined, paused or opted out.

An open estimate is not a lost sale. Keep pending decisions separate from closed outcomes when reviewing acceptance.

WHEN SENDING THE ESTIMATE

"Here is estimate [reference] for [scope]. [Assumption or exclusion] is stated in the document. If you want to discuss an option, contact [method]. Would you like us to follow up on a date you choose, or would you prefer to get back to us?"

Confirm delivery using the actual sending record. Do not treat an email open as a buying decision.

FOLLOW UP ON AN AGREED DATE

"You asked us to check back about [reference] around [date]. Is there a question we can answer, or would you like more time?"

Only say the buyer requested that contact when the record supports it. Otherwise state the actual purpose without inventing an agreement.

CLARIFY A SPECIFIC QUESTION

"You asked about [scope, option or timing]. [Confirmed answer]. If that changes what you need, [owner] can revise the estimate before you decide."

Avoid pressuring the buyer to name an objection. Do not invent scarcity, discounts or urgency. A question pauses the sequence and starts a human conversation.

BUYER WANTS MORE TIME

"Would you like us to contact you on a particular date, or leave the next step with you?"

Record the answer. Silence does not authorize switching to a phone or text channel the buyer has not agreed to use.

CLOSE WITHOUT CHASING

"We will pause estimate follow-up for now. If you would like to discuss [reference] later, contact [method]. We will confirm the current scope, availability and price before proceeding."

Do not send another closeout after a decline or opt-out merely to complete a sequence.

AUTOMATION STOP RULES

- Any reply pauses queued sales messages and creates an owner task.
- Acceptance cancels sales follow-up and begins the agreed work handoff.
- A decline or opt-out stops the sequence.
- A revised estimate cancels reminders referring to the old version.
- A requested later date replaces the old next-action date.

REVIEW THE REGISTER

Check for unowned replies, messages sent after a stop, missing delivery records and estimates awaiting promised answers. For acceptance reporting, state the period and denominator, and separate open from closed estimates. Select any service targets from actual capacity and customer commitments; this pack supplies no universal response or close-rate benchmark.