



# PROFESSIONAL ESTIMATE & SALES CLOSING TOOLKIT

A practical, reusable member resource for presenting clear quotes, earning customer confidence, and moving prospects forward without pressure.

**Inside:** Estimate template | Scope checklist | Delivery scripts | Follow-up messages | Conversion tracker



CUSTOMER GROWTH ACADEMY • BUSINESS-NERDS.COM

# 1. Reusable Professional Estimate Template

Copy this template into your quoting tool or document. Replace every bracketed field. Confirm local requirements before using it as a binding contract.

**Business name:** [Business name] **Estimate #:** [Number]

**Business contact:** [Phone / email / website] \_\_\_\_\_

**Customer name:** [Name] **Date issued:** [Date] \_\_\_\_\_

**Service address or location:** [Address / location] \_\_\_\_\_

**Service requested:** [Short description] \_\_\_\_\_

## Scope of work

[Describe the work, deliverables, materials, preparation, cleanup, and service boundaries. Be specific enough to avoid misunderstandings.]

## Price breakdown

| Item / service           | Quantity | Unit price | Line total |
|--------------------------|----------|------------|------------|
| [Service or labor]       | [ ]      | [\$ ]      | [\$ ]      |
| [Materials / supplies]   | [ ]      | [\$ ]      | [\$ ]      |
| [Other disclosed fees]   | [ ]      | [\$ ]      | [\$ ]      |
| Subtotal / taxes / total | —        | —          | [\$ ]      |

**Timing:** Proposed start [date / subject to availability] | Estimated duration [range]

**Exclusions:** [What is not included] | **Assumptions:** [Site access, condition, etc.]

**Changes:** Any additional work or revised pricing requires customer approval before proceeding.

**Payment terms:** [Deposit, milestones, final balance, accepted methods, due dates]

**Estimate validity:** [Expiration date, if applicable and genuine]

**Approval process:** [Reply, e-sign, deposit, or scheduling instructions]

## 2. Service Scope & Estimate Quality Checklist

Review before sending every estimate. Only check items that actually apply to your service.

- Customer need and requested outcome are understood
- Exact work and deliverables are described
- Materials, labor, and service quantities are identified
- Preparation, cleanup, and responsibilities are clear
- Price, taxes, fees, and payment terms are disclosed
- Exclusions and assumptions are stated
- Timeline and availability are realistic
- Any licensing, warranty, or insurance statements are accurate
- Change-order process is explained
- Customer knows how to ask questions and approve

### Before sending: 3 questions

1. Could a customer understand exactly what they are buying?
2. Could any omitted detail cause a pricing or scope dispute?
3. Is the next step simple and pressure-free?

### Value statement builder

"This estimate includes **[specific scope]** to help you achieve **[desired outcome]**. The price covers **[verified components]**, and the next step is **[approval or scheduling process]**."

### 3. Copy-Ready Estimate Delivery Scripts

Personalize each message. Do not claim a quote has been reviewed, approved, or scheduled unless it has.

#### Script A — First estimate delivery

“Hi [Name], thanks for sharing the details of your [project/service]. I’ve attached your estimate for [scope]. It outlines what’s included, the pricing, and the proposed timeline. Let me know what questions you have. If everything looks right, I can explain the next step.”

#### Script B — Explaining value

“Hi [Name], I wanted to highlight what your estimate covers: [specific included work], [specific included work], and [specific included work]. I’m happy to walk through the scope so you can compare options accurately. Is there anything you’d like clarified?”

#### Script C — Invitation to approve

“Hi [Name], if the estimate matches what you’re looking for, the next step is [approval method]. After approval, we’ll confirm [schedule / payment / preparation]. No rush—please review the details and let me know if you have questions.”

### 4. Three Respectful Follow-Up Messages

#### Follow-up 1 — Clarify

“Hi [Name], just checking whether you had any questions about the estimate for [service]. Happy to explain the scope, price, or next steps.”

#### Follow-up 2 — Address concerns

“Hi [Name], I know comparing options takes time. Is there anything in our estimate you’d like me to clarify before you decide?”

#### Follow-up 3 — Close the loop

“Hi [Name], I’ll close the loop on the estimate for now so I don’t keep messaging you. If you decide to revisit [service], you’re welcome to reach out. Thank you for considering us.”

**Important:** Use an appropriate cadence for the relationship and channel. Honor opt-outs, consent requirements, and applicable messaging laws. Never fabricate urgency or availability.

## 5. Estimate-to-Customer Conversion Tracker

Use one row per estimate. Record only information necessary for the business; store customer details securely.

| Estimate ID | Date | Amount | Status      | Outcome    |
|-------------|------|--------|-------------|------------|
| [001]       | [ ]  | [\$ ]  | [Sent]      | [Pending]  |
| [002]       | [ ]  | [\$ ]  | [Follow-up] | [Won/Lost] |
| [003]       | [ ]  | [\$ ]  | [ ]         | [ ]        |
| [004]       | [ ]  | [\$ ]  | [ ]         | [ ]        |

### Simple monthly scorecard

Estimates sent: \_\_\_\_\_

Estimates accepted: \_\_\_\_\_

Total quoted value: \$ \_\_\_\_\_

Total accepted value: \$ \_\_\_\_\_

**Estimate acceptance rate** = Accepted estimates ÷ Estimates sent × 100. Example: 8 accepted out of 20 sent = 40%.

**Follow-up review:** Which estimate questions or concerns appear repeatedly? What part of the process needs clarification?

### 7-day implementation plan

Day 1: Customize the estimate template. Day 2: Audit current estimates. Day 3: Save three delivery scripts. Day 4: Create your follow-up reminders. Day 5: Start the tracker. Days 6–7: Review feedback and refine your wording.

Educational resource only. Adapt pricing, contract language, privacy practices, and communications to your business and applicable law. No conversion outcome is guaranteed.