Follow up like a business partner.

Practical messages and a simple inquiry pipeline for construction teams. Adapt the examples to the customer, channel, and permissions you have.

Every message needs a job: acknowledge the inquiry, clarify the project, confirm a next step, or help the buyer decide. If it does none of these, rewrite it.

01 / Acknowledge a new inquiry

Example: "Hi [Name], this is [Your name] with [Company]. Thanks for reaching out about [service]. I have your request. What is the project location, and when are you hoping to have the work completed? Once we understand the scope, we can confirm the best next step."

Record: requested service, location, timing, inquiry owner, and next action. Do not promise availability or pricing before checking.

02 / Confirm a call or site visit

Example: "We are set for [day/time] at [location / phone]. We will talk through [scope] and what we need for a useful estimate. If you have [relevant plans/photos], please have them available. If anything changes, contact [person/channel]."

Record: appointment, responsible team member, required information, and any access arrangements.

03 / When you have not connected

Example: "Hi [Name], I am following up on your [service] request. Are you still planning this project? If so, let me know a useful time to speak. If your timing has changed, that is helpful to know too."

Record: last contact attempt and the next appropriate action. Respect a request to stop; avoid repeated automated messages without a purpose.

Help the buyer make the next decision.

A thoughtful follow-up reduces uncertainty. It does not pretend that pressure is service.

04 / After sending an estimate

Example: "Hi [Name], I wanted to check that the estimate for [scope] came through clearly. What questions would help you evaluate it? We can walk through the scope, sequence, and any assumptions before you decide."

If appropriate: "Would [day] be a useful time to check in, or do you need longer?" Agree on the next contact rather than guessing.

05 / Clarify a stalled decision

Example: "Before I close the loop, is the main question scope, timing, budget, or something else? If the project is on hold, let me know and I will update our notes. If we are not the right fit, that is okay too."

Record: the buyer's stated reason. Do not translate every delay into "price too high."

06 / Handoff after approval

Example: "Thanks, [Name]. The next step is [actual step]. [Person] will handle [responsibility] and contact you by [agreed time]. We have recorded [important scope detail]. Please let us know if anything has changed before that conversation."

Record: approved scope, next owner, customer commitments, and where delivery can find the source information.

> Use automation to remember, not to pretend. A reminder can prompt a real person to act. An automated message should match the customer's status and the process your team can deliver.

A pipeline the whole team can understand.

The companion CSV is a blank starter. Import it into a spreadsheet or adapt the fields for your existing CRM.

Field	What to record
Inquiry ID / received date	A stable reference and when the request arrived.
Name / contact / service / location	Enough information to understand and reconnect with the buyer.
Source / stage	Where the opportunity came from and its current status.
Owner / next action / due date	One person, one concrete next step, and when it should happen.
Scope / timing / fit	What the buyer needs and whether your team can serve it.
Last contact / outcome / reason	A useful history and why a project moved forward or stopped.

Suggested stage names

New inquiry > Contacted > Qualified > Site visit / estimate > Decision pending > Won / not proceeding. Adjust these to your workflow, but agree on what qualifies an inquiry to move.

A 15-minute weekly review

• Which new inquiries have no owner? Assign one.

• Which next actions are overdue? Decide what happens now.

• Which estimates need a question answered rather than another reminder?

• Which inquiries were poor fits? Record the reason; improve targeting or clarity.

• Which won projects need a cleaner handoff into delivery?

The standard: No live inquiry without an owner. No active opportunity without a next step. No outcome without a reason the next person can understand.