



The Quote-to-Cash Follow-Up System

Turn quotes into cash — consistently. A complete system with templates designed specifically for small and medium business owners who want to convert more quotes and improve cashflow.

THE CHALLENGE

If You Send Quotes But Cashflow Is Still Tight

You don't have a marketing problem. You have a **follow-up system** problem.

Most small and medium businesses lose sales after sending the quote. The quote goes out, silence follows, and the opportunity disappears into the void of "I'll get back to you."

Sound familiar? You're not alone. This is the most common revenue leak in service-based businesses.

Most SMEs Lose Sales Because:

- Follow-ups are inconsistent or non-existent
- "Keen" prospects never convert to deposits
- There's no clear pipeline visibility
- Late payments aren't handled systematically
- Awkwardness stops you from following up

A Simple System You Can Run in 30 Minutes a Day

This isn't about working harder. It's about working smarter with a repeatable system that removes guesswork and awkwardness from your sales process.

Easy Pipeline Tracking

See exactly where every opportunity stands at a glance

Scheduled Follow-Ups

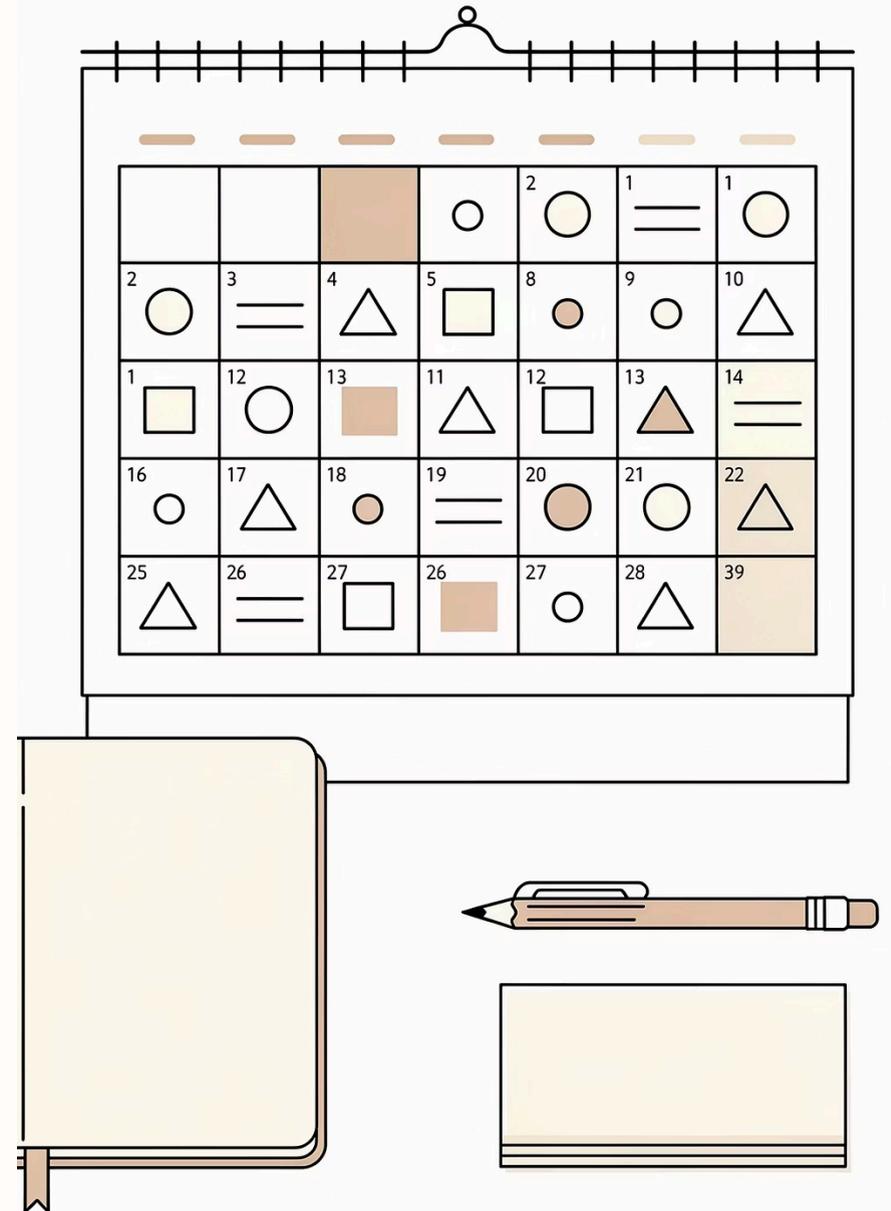
Know exactly when to reach out and what to say

Copy/Paste Messages

Professional scripts that move people to the next step

Calm Collections

A systematic approach that protects cashflow and relationships



GOLDEN RULE

Sales Isn't the Quote. Sales Is the Deposit.

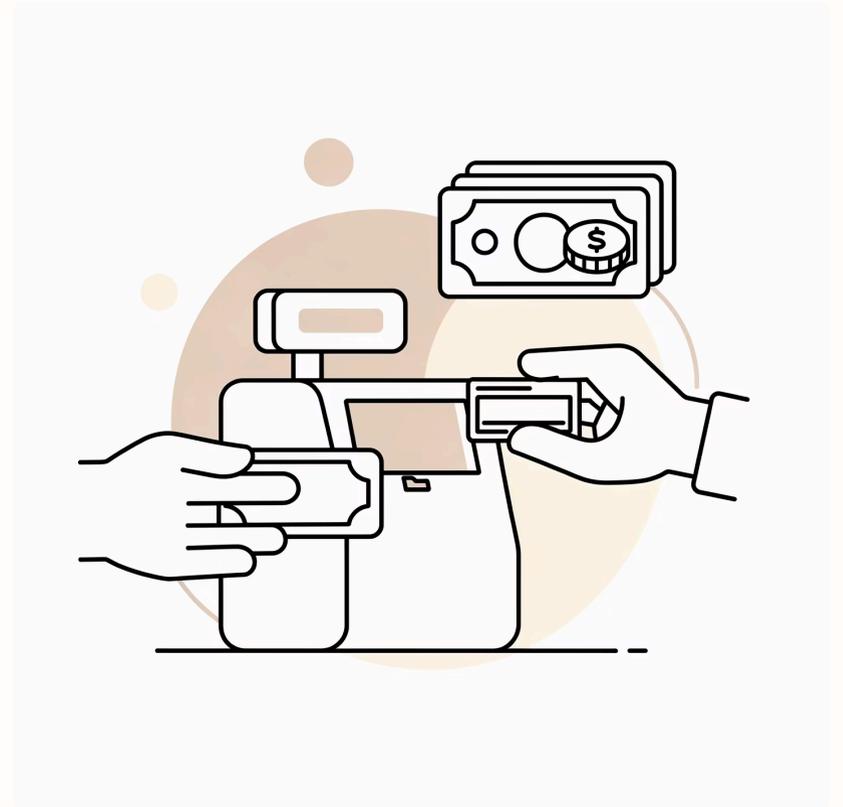
Until money lands in your account, it's still a maybe. Hope is not a business strategy, and verbal commitments don't pay bills.

This simple mindset shift changes everything. You stop counting quotes as wins and start counting deposits as the only metric that matters.

Your New Daily Habit:

Follow-up before 10:00 AM + Deposit-first terms

These two habits will transform your cashflow within 30 days.



The Pipeline: Your Single Source of Truth

If an opportunity isn't in a stage, it doesn't exist. Use these nine stages to track every prospect from first contact to paid invoice. Keep it simple — complexity kills consistency.

01

New Lead

First contact or inquiry received

02

Qualified

Right fit confirmed, budget and timeline discussed

03

Quote Sent

Formal proposal delivered with clear next steps

04

Follow-Up Due

Scheduled touch-point to move toward decision

05

Awaiting Deposit

Commitment made, waiting for payment to confirm

06

Booked / Scheduled

Deposit received, date locked in, work scheduled

07

Delivered

Service completed, final invoice sent

08

Paid

Full payment received, job closed

09

Review + Referral

Testimonial requested, referral seed planted

Your Daily Scoreboard: Three Numbers That Matter

Every morning before you do anything else, look at these three metrics. This simple habit keeps your attention on cashflow instead of busywork.

7

Quotes Sent

In the last 7 days — this is your current opportunity pipeline

Today

Follow-Ups Due

Action items for today — these conversations move deals forward

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Deposits Outstanding

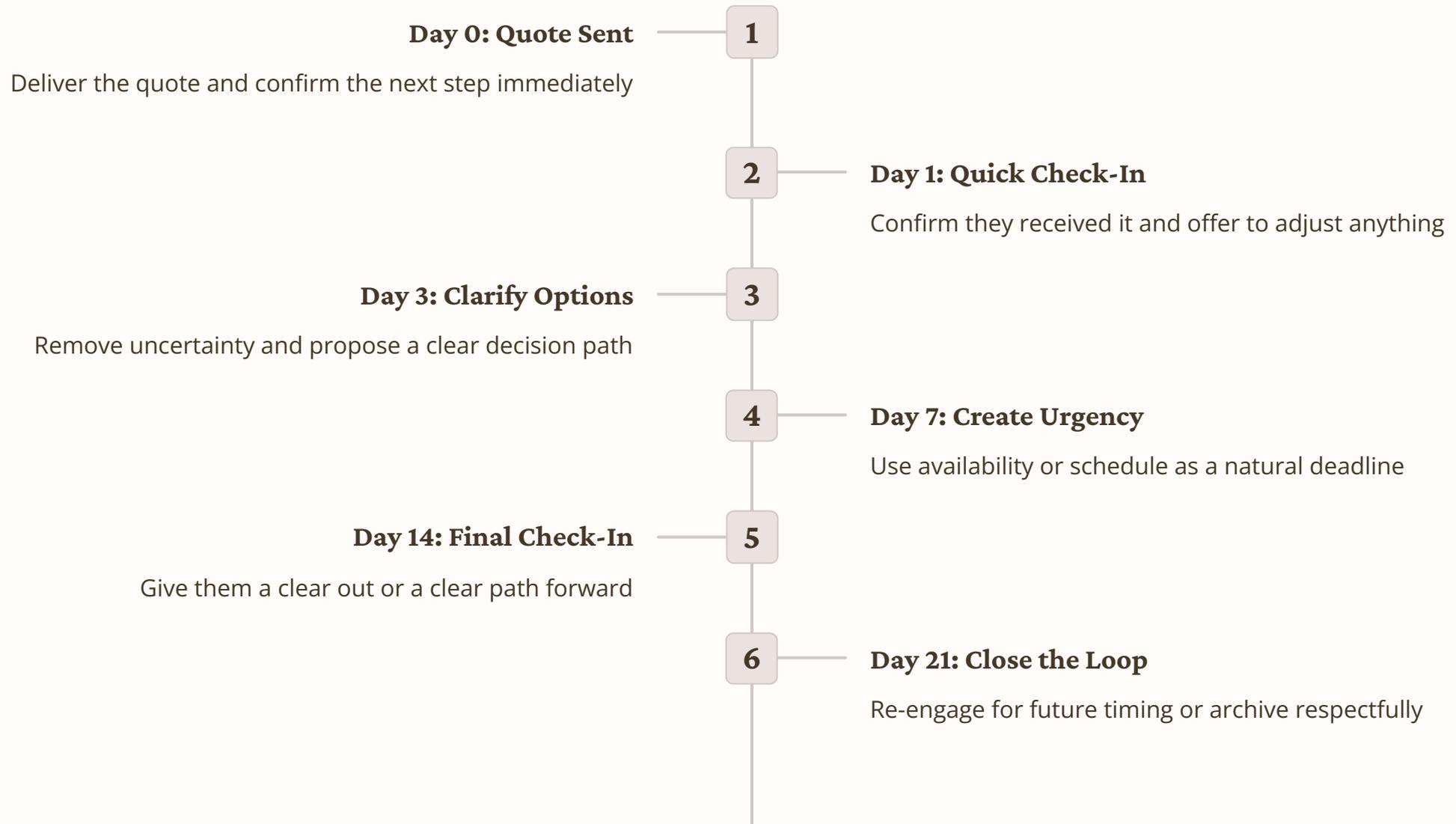
Money you're waiting for — the gap between verbal yes and cash yes

If you only track three things in your business, make it these three. Everything else is noise.



The Follow-Up Rhythm: No More Guesswork

Stop winging it. Use this proven schedule to stay top-of-mind without being pushy. Each touch-point has a specific purpose and moves the prospect closer to a decision.



📌 You're not being annoying. You're being professional. Prospects expect follow-up from businesses they want to work with.

Script: Quote Sent — Set the Next Step Immediately

The moment you send the quote is your highest-leverage opportunity. Don't just attach a PDF and hope. Guide them to the next action.

WhatsApp Version

"Hi [Name] 🙌 I've sent the quote for [Service]. If you're happy, we can confirm the booking with the deposit and lock in [Day/Date].
Want me to hold a slot for you?"

This version is casual, direct, and creates a small commitment opportunity immediately.

Email Version

Subject: Quote for [Service] + next step

"Hi [Name], attached is the quote for [Service]. If you'd like to proceed, the next step is the deposit so we can confirm the booking for [Day/Date]. Happy to adjust anything if needed."

Professional, clear, and action-oriented.

Script: The "Adjust Anything?" Follow-Up

This follow-up removes the biggest objection most prospects have: "I'm not sure if this is exactly what I need." Give them permission to customize.

Opening Message

"Quick check-in — did you get a chance to look at the quote? Anything you'd like me to adjust so we can finalise it?"

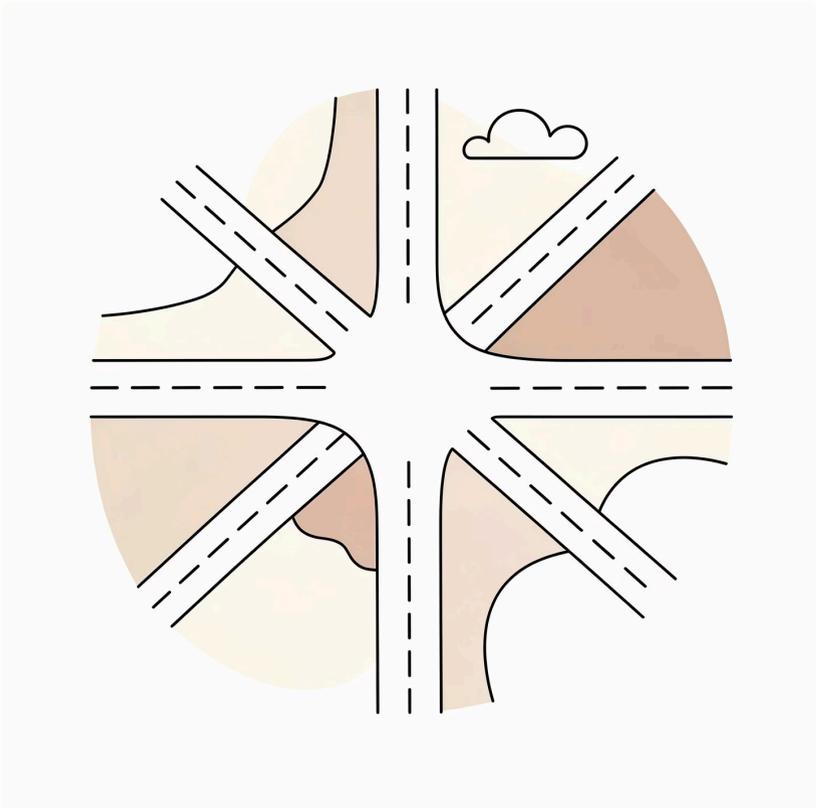
If They Say "We're Still Deciding"

"No problem. What are you deciding between — price, timing, or scope? I can help you choose the best option."

This response transforms vague hesitation into a specific conversation you can actually address. Most prospects don't know how to articulate their concern — help them.



Script: Move to Decision — Remove Uncertainty



By day three, it's time to push for clarity. Most prospects appreciate directness — they're busy too and don't want things lingering.

"Just checking where you're at with this. If you want to go ahead, I can send the deposit invoice and secure your booking for [Day/Date]. If not, no stress — just tell me and I'll close it off on my side."

This removes uncertainty and gets an answer. The "no stress" language gives them psychological permission to say no, which paradoxically makes them more likely to say yes.

○	□	■	□	■
○	■	□	□	□
□	□	■	□	○

DAY 7 SCRIPT

Script: Schedule Pressure — Use Natural Urgency

By day seven, you need to create a reason for them to decide now. The best urgency is natural urgency — your actual schedule, not fake scarcity.

"Hi [Name] — we're planning next week's schedule now. If you still want [Service], I can hold a slot for you, but it'll need the deposit to confirm. Should I send the invoice?"

- ☐ Use calm urgency, not aggressive pressure. You're helping them make a decision, not manipulating them into one. Real businesses have real schedules — communicate yours clearly.

Script: Final Follow-Up — Close the Loop Professionally

If they haven't responded by day 14, it's time for a final check-in. If they still don't respond by day 21, close the loop respectfully and move on. Your time has value.

1

Day 14: Final Check-In

"Last check-in from my side. Do you want to proceed, pause, or close this off for now?"

2

Day 21: Respectful Close

"If the timing isn't right, that's okay. If you want to revisit later, message me anytime and I'll help you plan it properly."

This is professional, respectful, and clear. You're not burning the bridge — you're just acknowledging that this isn't the right time. Many prospects will come back later when they're ready, and they'll remember how professionally you handled the situation.

Deposits & Booking: When It Becomes Real



A booking is only confirmed when three things happen. Until all three are in place, you don't have a sale — you have a hopeful conversation.

Booking Confirmed When:

- Deposit is paid and reflected in your account
- Date is agreed and blocked in your calendar
- Scope is confirmed in writing

Deposit Confirmation Message:

"Perfect — I'll send the deposit invoice now. As soon as it reflects, I'll confirm your slot for [Day/Date] and send the next steps."

Late Payment Process: Calm, Systematic Collections

Don't wing it when payments are late. Inconsistency damages relationships and cashflow. Use this simple ladder to escalate professionally while protecting both dignity and money.



Day 1: Friendly Reminder

"Hi [Name], just a quick reminder that payment for [Invoice #] was due yesterday. Let me know if you need the details resent."



Day 7: Firm Reminder

"Payment for [Invoice #] is now 7 days overdue. I'll need to pause work until this is settled. Let me know how you'd like to proceed."



Day 3: Direct Reminder

"Following up on payment for [Invoice #]. Can you confirm when this will be processed? I can accept [payment methods] if that helps."



Day 14: Final Notice

"Final reminder: [Invoice #] is now 14 days overdue. If payment isn't received by [Date], I'll need to take further action. Please confirm payment today."

Consistency protects both dignity and cashflow. Most late payments are due to disorganization, not malice. A clear process helps everyone.

Review + Referral Trigger: Strike While It's Fresh

After payment clears, you have a narrow window when satisfaction is highest. This is when reviews and referrals happen naturally — but only if you ask.

Request the Review

"Thanks again, [Name] — I really appreciate it. If you were happy with the service, would you mind leaving a quick review? It helps a small business a lot. Here's the link: [link]."

Keep it short, genuine, and make it easy. Include a direct link — every extra click costs you reviews.

Plant the Referral Seed

"And if you know someone who needs [Service], feel free to send them my details."

Don't ask for referrals directly — it feels transactional. Instead, give them permission to share. This plants the seed without pressure.

The Daily Tracker: Your Morning Ritual

Screenshot this slide and use it every morning. Before you check email, before you scroll social media, before you do anything else — run through your follow-ups.

Today's Follow-Ups (Before 10:00 AM)

1. _____ (Stage: Quote Sent / Follow-Up Due / Awaiting Deposit)
2. _____ (Stage: Quote Sent / Follow-Up Due / Awaiting Deposit)
3. _____ (Stage: Quote Sent / Follow-Up Due / Awaiting Deposit)
4. _____ (Stage: Quote Sent / Follow-Up Due / Awaiting Deposit)
5. _____ (Stage: Quote Sent / Follow-Up Due / Awaiting Deposit)

Write the prospect name and their current stage. Work through the list systematically. By 10:00 AM, every follow-up should be complete.

Track Outcomes: Close the Loop on Every Opportunity

After each follow-up, record the outcome immediately. This creates accountability and helps you identify patterns in your conversion process.



Booked

Deposit received, date confirmed



Waiting

Still in conversation, follow-up scheduled



No

Clear rejection, move on respectfully



Later

Genuine "not now," set reminder for future



Archived

No response after day 21, close the file

Every opportunity must end in one of these five outcomes. If it's not clear which one, keep following up until it is.

This System Works When You Work the System

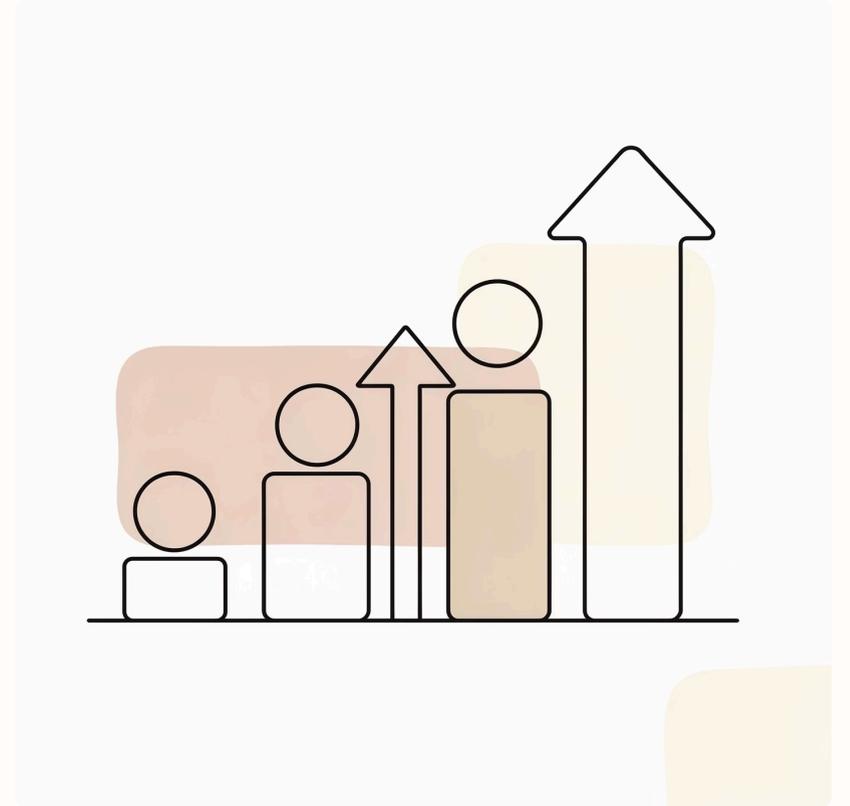
The difference between businesses that consistently convert quotes and those that struggle isn't talent, pricing, or even product quality. It's **consistency in follow-up**.

This system removes the guesswork, the awkwardness, and the mental load of wondering "should I follow up today?" The answer is always yes — if they're in your pipeline, you follow up.

The Three Commitments:

1. Check your scoreboard every morning before 10:00 AM
2. Use the scripts exactly as written until you internalize the rhythm
3. Track outcomes for every single opportunity

Do this for 30 days and you'll never go back to winging it.





Get the Full System + Templates

Ready to implement this system in your business? Get the complete package with ready-to-use templates, tracking spreadsheets, and message scripts you can copy and paste.

Done-for-You Implementation

Want Hyperloop to implement this system with you?

Message: IMPLEMENT to 061 587 4244

We'll set up your CRM, automated reminders, custom dashboards, and train your team on the complete system.

The system is simple. Implementation is where most businesses fail. Don't let that be you.