HYPER LOOP

TEMPLATES BUNDLE

1) Pipeline stages (use in CRM, Trello, Notion, spreadsheet)

New Lead → **Qualified** → **Quote Sent** → **Follow-Up Due** → **Awaiting Deposit** →
Booked/Scheduled → **Delivered** → **Paid** → **Review/Referral**

Stage rules (simple):

- Quote Sent = quote delivered to customer

- Follow-Up Due = next action date is today or overdue

- Awaiting Deposit = customer said yes, money not in yet

- Booked = deposit paid + date confirmed

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2) Follow-up schedule (what to do + why)

Day 0 (Quote sent): Confirm receipt + next step
Day 1: Offer to adjust scope/timing
Day 3: Ask for a decision + propose deposit
Day 7: Availability/schedule message
Day 14: Final check-in (proceed/pause/close)
Day 21: Re-engage or archive kindly

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3) WhatsApp scripts (sales)

Day 0 — Quote sent

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

Day 1 — Check-in

"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?"

Day 3 — Decision

"Just checking where you're at with this. If you want to proceed, 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."

Day 7 — Scheduling urgency

"Hi [Name] — we're finalising next week's schedule. 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?"

Day 14 — Proceed / pause / close

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

Day 21 — Re-engagement

"If the timing isn't right, no problem. If you want to revisit later, message me anytime and I'll help you plan it properly."

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4) Email templates (sales)

Email: Quote sent

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 your booking for [Day/Date]. If you want any changes to scope or timing, reply here and I'll adjust it.
Thanks,
[Name]

Email: Follow-up

Subject: Quick check-in on the quote for [Service]
Hi [Name],
Just checking in — did you get a chance to review the quote? If you'd like to go ahead, I can send the deposit invoice to secure your booking. If you're not proceeding, just let me know and I'll close it off on my side.
Thanks,
[Name]

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5) Deposit + booking flow (copy/paste)

Deposit invoice 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."

Booking confirmation message (after deposit)

"Deposit received — thank you 🙌 You're booked for [Day/Date at Time]. Here's what I need from you before we start: [list 1–3 items]."

Pre-appointment reminder

"Reminder: we're scheduled for [Day/Date]. Please make sure [access / info / prep] is ready. See you then."

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6) Late payment templates (calm but firm)

Day 1 — Friendly

"Hi [Name], quick reminder that invoice #[X] for R[amount] was due yesterday. Please confirm when payment will be made."

Day 3 — Direct + method

"Hi [Name], following up on invoice #[X] (R[amount]) which is still outstanding. Please settle today or send proof of payment. Bank details: [details]."

Day 7 — Firm + boundary

"Hi [Name], invoice #[X] remains unpaid. Please note we pause further work / delivery until payment reflects. Let me know once it's done so we can continue."

Day 14 — Final

"Final follow-up regarding invoice #[X]. If payment isn't received by [date], we will proceed with the next steps per our terms."

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7) Review + referral script (after payment)

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

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8) One-page daily tracker (paste into a doc / sheet)

Date: _____
Follow-ups before 10:00 (target 10):

 Name Stage Last contact Next action Outcome

Today's results:

- Quotes sent: _____

- Deposits received: _____

- Payments collected: R _____
  One fix for tomorrow: _____