Laverne Weber Business Systems

Weekly open-quote review

Week of: _____

1. Gather sent quotes. Check your quoting tool and email. Bring forward open quotes from last week.

2. Check the status. Note the latest customer reply. Mark accepted or declined quotes and move them out of the open list.

3. Choose the next step. Give each open quote one owner, a specific action and a follow-up date. Respect the customer's requested timing.

4. Work the dates. Check due follow-ups during the week. Record the outcome in your usual tools and review again next week.

Stage ideas: Sent · Waiting for reply · Questions to resolve · Decision pending.
Next action: write "Call about start date" rather than just "Follow up".

Customer / job	Quote-sent date	Stage	Owner	Next action	Follow-up date

This sheet tracks sent quotes and follow-up only. Keep estimating, quoting, invoicing and accounting in your existing tools.

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