The Follow-Up Playbook

How we turn every estimate into a relationship: record the visit, capture the personal details, and follow up like someone who was in the room.

4 personal texts **14** days of nurture **5 min** after-visit routine

THE ROUTINE

Five minutes in the car

Do this after every appointment. It is the entire job.

1 Record with permission

Phone voice recorder is fine. Say up front: “Mind if I record our conversation so I don’t miss any details?” Always ask.

2 Log the nine fields

Open the contact in the CRM app and fill these in while it is fresh.

Spouse / partner name So every text feels personal.	**Interests & hobbies** Fishing, grandkids, classic cars.	**Home details & notes** The workshop, the boat, the deck.
Personal follow-up line One sentence in your own words.	**Project timeline** When they want it done.	**Why waiting** Spouse, budget, thinking it over.
Price quoted The last price given.	**Color choice** The finish they liked.	**Square footage** The area measured.

3 Tag the contact `estimate-complete`

That is the trigger. The nurture starts on its own from there. Upload the recording to the prospect’s Drive folder if you want it kept.

NON-NEGOTIABLES

The rules

Respect the clock
9am to 8pm Central only. Never earlier or later.

Say who you are
Every text names you and Pegasus Surfaces.

Stop means stop
Opt out means out. No exceptions, no follow-up.

Keep it private
Homeowner details stay in the CRM. Never shared.

THE SEQUENCE

What the homeowner receives

Four texts over two weeks, all in Taylor's voice. Any reply stops the sequence.

NEXT MORNING · 9AM

> *"Hi {first_name}, Taylor with Pegasus Surfaces. Great meeting you yesterday! {your personal line} When you've had a chance to talk it over I'm here for any questions."*

Your one-line note drops in automatically. This is why step 2 matters.

DAY 3

> *"Hi {first_name}, checking in. Any questions come up about the quote? No rush at all. - Taylor, Pegasus Surfaces"*

DAY 7

> *"Quick thought, {first_name}: road salt eats unsealed concrete every winter here in Minnesota. Happy to walk through the quote again anytime, just reply or call (651) 447-8234. - Taylor"*

DAY 14

> *"Hi {first_name}, last check-in from me. The quote stands whenever you're ready. Reply here or call (651) 447-8234 anytime. - Taylor, Pegasus Surfaces"*

Soft close: no guilt, no pressure. The door stays open.

GET SET UP

One-time setup checklist

Every salesperson does this once before their first appointment.

- ☐ **CRM account** in the Pegasus subaccount, app installed and logged in.
- ☐ **Phone voice recorder**, tested once.
- ☐ Know where the **nine fields** live.
- ☐ Know the **consent line** and the tag by heart.

Stronger Surfaces. Built to Last.

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