

A ten-minute quote review

Pick 20 open quotes. Check three things: one owner, one next action, and one next-contact date.

1. Start with the open work

Export the quotes you are still pursuing. Include the quote ID, customer, sent date and current status. Keep won, lost and deliberately paused work separate.

2. Put a person and a date on each one

For each open quote, name one person responsible for the next step. Write the action in plain English, such as confirm delivery requirements or ask whether the project is still active. Give it a real date.

3. Review exceptions first

Start with missing owners, missing next steps and overdue contact dates. Check replies before sending another message. Review expired quotes before repeating a price or delivery promise.

A follow-up your team can adapt

Hi [name],

Is [project / quote number] still moving forward? If timing or requirements have changed, let me know what changed and I will update our side.

[Your name]

Use the worksheet

Open Syndesi-Quote-Follow-Up-Check.xlsx. Enter up to 100 quotes in the amber columns. Filter Review result to Action needed. Formula columns identify gaps; your team decides what to do next.

What to look at next week

Count how many open quotes had no owner or next step, how many were overdue, and how many received a clear customer response. Compare the same measures next week. An overdue quote is not automatically lost revenue.

Use and adapt this. No meeting or purchase is required.

If you want help fitting it to the systems you already use, reply to Peter at peter@syndesi.io.