01 / CHECK THE WHOLE JOURNEY

Ready for the next enquiry?

A clear website helps someone contact you. A simple process helps you deal with that contact. Use your last three genuine enquiries to find one worthwhile improvement.

Mark yes, no or unknown. Keep one example.

- ☐ A new customer can see what we do, where we work and how to contact us.
- ☐ Our contact route is easy to use on a phone.
- ☐ A labelled test enquiry reaches the person responsible for replying.
- ☐ Every open enquiry has an owner and a next action.
- ☐ We collect the details needed for the next step without unnecessary personal information.
- ☐ We can tell whether a quote is draft, sent, accepted, declined or waiting.
- ☐ We check for replies before following up, and stop when the matter closes.
- ☐ We can find the agreed scope and the correct quote version.
- ☐ We know which accounts we own, what they cost and how to export our records.

Choose one useful fix

Start with a missing enquiry, unclear responsibility or repeated clarification. Your current email, calendar or job software may already be enough. An unknown answer is a reason to check, not proof of lost sales.

The problem:

The next action and owner:

02 / MAKE THE NEXT STEP CLEAR

A brief that helps you act

Ask only the questions that help your business decide what happens next. Adapt this list to the service you actually provide.

Useful enquiry questions

1. What would you like done, and what would a useful finished result look like?

2. What area is the work in? An approximate location can be enough for an initial fit check.

3. Is there a preferred time or a genuine deadline? Is it flexible?

4. What dimensions, quantities or existing materials are known? It is fine to be unsure.

5. Would photographs help? Avoid people, private documents and unrelated personal details.

6. Are there access or practical constraints? How would you prefer us to reply?

A ten-minute owner routine

Check: new enquiries and failed or uncertain notifications.

Assign: one owner, one next action and a realistic review date.

Clarify: ask for missing details or explain the next step.

Review: check waiting quotes against recent customer replies.

Close: record the actual outcome; pause for replies, bookings, disputes or opt-outs.

Keep the stages separate

Enquiry is not a booking. Quote value is not paid income. A sent notification is not proof that someone read it. Use the actual record for each stage.

Choose a routine that fits your volume. Repeatedly checking an empty dashboard is not valuable maintenance.

03 / KEEP CONTROL

Clear replies. Clean handover.

Use these drafts as starting points. Check the purpose, recipient, details, channel permissions and timing before sending. Nothing here sends automatically.

Acknowledge a requested enquiry

Thanks for your enquiry about [service]. We have received the details you sent. [Owner] will review them and aim to reply by [realistic date or window]. This confirms receipt only; work and appointments are agreed separately.

Check a requested quote

Hello [name], I am checking whether you received quote [reference] for [scope]. If you have a question or your plans have changed, please let me know. We will confirm current availability before booking.

Close the loop without pressure

Hello [name], I will close our follow-up on quote [reference] for now. If you would like to revisit the work, please get in touch and we can check the scope, price and availability again.

Before you accept a new system

- ☐ Know who owns the accounts, the subscription and usage costs, and the recovery route.
- ☐ See how an enquiry reaches its owner, how a failure appears and how to pause follow-ups.
- ☐ Practise a normal case and an exception using test records.
- ☐ Keep a usable guide, agreed support scope, export and exit instructions.

A useful process should make the next action easier to see. Keep what works, improve one real problem and measure the effort as well as the outcome.