

01 / MAKE THE WORK VISIBLE

Open Estimate Reset Kit

Seven days to give each open estimate a clear next step.

Use this with one person responsible for maintaining the list. Start with work you can review accurately and follow up on appropriately.

Keep the numbers honest. An open quote is not booked revenue, lost revenue, or a promise of recoverable revenue. Record facts and decisions.

DAY 1

Build one reliable list

List the internal estimate or job reference, sent date, owner, and current status. Remove duplicates and mark anything unknown instead of guessing. Use the scope worksheet on page 2 to identify missing scope information.

DAYS 2-3

Give every estimate an owner

Record **one owner, a current status, missing information, one next action, and a due date**. Use page 2 to check scope and assumptions.

Status labels: Draft / Sent / Needs clarification / Considering / Accepted / Declined / Closed. Check estimate validity before restating a price.

DAYS 4-7

Act, record, and review

Days 4-6: Complete the agreed next action. Clarify unresolved scope or ask about the decision using page 3. Contact only through an appropriate, permitted channel; stop if asked.

Day 7: Review what changed. Record the response, update the status, and set a sensible next action or close the loop. No response is not acceptance.

RESET STARTS

LIST OWNER

02 / RESOLVE THE UNKNOWNNS

Scope & Decision Check

Complete one copy per estimate. Confirm facts with the right person before changing scope, restating a price, or asking for approval.

CUSTOMER / PROJECT

ESTIMATE REFERENCE / DATE

INCLUDED IN THE ESTIMATE

EXCLUDED / SEPARATELY PRICED

PRICE ASSUMPTIONS / VALIDITY

Quantities, access, timing, allowances, and expiration.

MISSING INPUTS / UNRESOLVED SCOPE

What is needed, from whom, and by when?

APPROVAL OWNER / ROLE

CURRENT DECISION / STATUS

NEXT STEP / RESPONSIBLE PERSON

DUE DATE

Before moving forward: Check that the estimate matches the intended work, material assumptions are explicit, and the person making the decision can approve it. Record any required revision.

03 / FOLLOW UP WITH A PURPOSE

Follow-Up & Decision Log

Replace every bracketed item with verified details. Use only the template that fits the actual situation and your existing customer relationship.

01 Clarify a specific scope question

Hi [customer name], I am reviewing estimate [reference] for [project]. We still need to confirm [specific unresolved item] so the scope is accurate. Could you share [needed detail], or let me know if the project has changed? Once confirmed, we can explain any effect on scope, price, or timing. If you prefer no further follow-up, please let me know. Thank you, [sender name].

02 Ask about the decision

Hi [customer name], I am checking in on estimate [reference] for [project]. Is there an unresolved question about [scope or decision item] that would help you decide? Please let me know whether you are still considering it, need a revision, or have decided not to proceed. If the timing has changed, you can tell me that too. If you prefer no further follow-up, please let me know. Thank you, [sender name].

Record the decision, then choose the next action.

DATE / ESTIMATE REFERENCE

CONTACT OWNER / CHANNEL

RESPONSE / CONFIRMED DECISION

NEXT ACTION / OWNER / DUE DATE (OR CLOSED / STOP)

Record requests to stop and honor them. Silence does not authorize work or repeated contact.