⏱️ 20 MIN SETUP

Automatic Quote Follow-Up Emails With Zapier or Make

Part of our Small Business Automation guide: what to automate first and the 10 easiest wins.

The problem

Many quotes are lost simply because no one follows up. A short automatic sequence nudges the customer politely and stops once they reply.

What you need

- A list of sent quotes (Google Sheets, or your quoting tool)
- Zapier or Make
- Gmail or Outlook

Setup with Zapier

1. Track your quotes in Google Sheets with columns for name, email, date sent and status.
2. Create a Zap with the trigger **Google Sheets, New Row**.
3. Add **Delay by Zapier** (2 days), then a **Filter** that only continues if status is still ‘open’.
4. Add **Gmail, Send Email** with follow-up 1, then repeat the delay, filter and email steps for day 5 and day 10.
5. Mark the row ‘won’ or ‘lost’ when they reply so the sequence stops.

Setup with Make

1. Use **Google Sheets, Watch Rows**.
2. Add Sleep, a **Search Rows** status check and a Gmail step for each follow-up.
3. Turn it on.

Quote follow-up message template (email or Twilio text)

> Hi [Name], just checking you got our quote for [job]. Happy to answer any questions or adjust anything. Reply and we'll take it from there.

Consent and local rules

The customer asked for this quote, so follow-ups about it are generally fine. Keep it to about three, stop when they say no, and don't add unrelated promotions. This isn't legal advice.

FAQ

How many times should I follow up a quote?

Three follow-ups spread over about 10 days is a good limit. That's enough to catch busy customers without pestering them. Stop as soon as they say yes or no.

Does the sequence stop automatically?

Yes, once you update the status in your sheet to won or lost. The filter step checks the status before each email and stops if it’s no longer open.

What should a quote follow-up say?

Check they got the quote, offer to answer questions, and make it easy to reply. Keep it short and friendly, with no pressure or unrelated promotions.

Can I follow up by text instead of email?

Yes, if the customer gave you their mobile for the quote. Swap the Gmail step for Twilio, and include your business name and “Reply STOP to opt out” in each text.

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One-page checklist: Quote follow-up sequence

- ☐ Track your quotes in Google Sheets with columns for name, email, date sent and status.
- ☐ Create a Zap with the trigger Google Sheets, New Row.
- ☐ Add Delay by Zapier (2 days), then a Filter that only continues if status is still 'open'.
- ☐ Add Gmail, Send Email with follow-up 1, then repeat the delay, filter and email steps for day 5 and day 10.
- ☐ Mark the row 'won' or 'lost' when they reply so the sequence stops.

Consent note: only message people who have contacted you or agreed to hear from you, and include a way to opt out. This isn't legal advice.

Full guide: https://www.automatequick.com/guides/quote-follow-up-sequence