The 21-Day Quote Follow-Up Script Pack

Every text, call and email to send after a quote that didn't sign, with objection handling for 15 common objections, including "I need to think about it." Find the objection the homeowner gave, then follow that block from the same day to Day 21.

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Plus: general scripts for any other objection, the 21-day schedule, and a tracker.

The 5 rules for every message

1. Send the first message the same day, within 1 hour of leaving the house.
2. Use the channel the homeowner uses. Text only if they agreed to texts.
3. Every message mentions something they said. Write it down before you leave the driveway.
4. Every message asks for one thing: a set day and time.
5. Stop the moment they book or say no. Don't send the rest.

The "call me later" rule

"Call me later," "I'll get back to you" and "let me look at my schedule" are not next steps. A next step has a day, a time, and who will be there.

Say: "Sure. So I don't bug you at a bad time, what's better, [day] at [time] or [day] at [time]? And will [spouse/partner name] be on too?"

If they won't pick a time: "No problem. I'll text you [day] morning to set a time. Sound fair?" Then put it in your phone right then, before you hang up.

Fill-ins: [First name] homeowner · [Partner] spouse or partner's name · [Rep] rep's first name · [Company] · [the project] (kitchen, roof, windows...) · [what they said] their words · [the one thing] what they cared about most · [day] / [time] two options to pick from.

The schedule, step by step (use it with any objection)

Before you leave the driveway (2 minutes)

1. In your phone notes, write: the homeowner's first name, the spouse or partner's name, the one thing they cared about most, in their words, and the exact objection, in their words.
2. Write down anything you promised to send (quote, photos, financing info, warranty, reviews).
3. Set 4 phone reminders now: Day 2, Day 5, Day 10, Day 21, each with the homeowner's name in it.

Same day (within 1 hour) — text. (see your objection's block)

Same day — send everything you promised. Attach it or link it in one message. Don't make them ask twice.

Day 2 — text with one useful idea. (see your objection's block)

Day 5 — phone call. (see your objection's block) If no answer, leave the voicemail below, then send the follow-up text.

- Voicemail (under 20 seconds): "Hi [First name], it's [Rep] from [Company]. I had a quick idea about [the one thing they cared about]. Call or text me at [phone]. Again, [Rep], [phone]."
  - Text right after: "Just left you a quick voicemail. Short version: [one-line idea]. What's a good time to talk?"

Day 10 — email or text that answers the objection. (see your objection's block)

Day 21 — close the loop. (see your objection's block)

If a spouse or partner was missing — use this version on the same day, before the regular text. (see your objection's block)

Track it (fill in as you go)

Touch	Sent? (✓)	Date	What they said
Same-day text			
Promised items sent			
Day 2			
Day 5 call			
Day 10			
Day 21			
Booked? Day and time:			

If they reply at any point: answer within the hour, use their words back to them, and ask for a set day and time. Then stop the schedule.

If they say yes: confirm the day, time and who will be there in one text, then put it on the calendar.

If they say no: thank them, ask "Is there anything we could have done differently?", and ask if they know anyone else thinking about [the project].

1. "We need to think about it"

What's behind it: *Usually one specific worry they didn't say out loud: price, trust, timing or the other decision maker. Your job is to find out which one.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for having me over today. I know you want to think it over, which makes sense. I'm sending the details now so you have everything in one place. Would [day] at [time] or [day] at [time] work for a quick 10-minute call to answer any questions?"

Day 2 text: "Hi [First name], one thing that might help while you think: you said [the one thing]. Here's how the option we talked about handles that: [one sentence]. Still good for a quick call [day] or [day]?"

Day 5 call:

1. "Hi [First name], it's [Rep] from [Company]. Do you have two minutes?"
2. "When we talked you said you wanted to think it over. Most people who say that have one thing they're still unsure about. What's the one thing for you?"
3. Stop talking and let them answer. Then answer that one thing, using the matching script below.
4. "Does that clear it up? Then would [day] or [day] work to get you on the schedule?"

Day 10 text or email: "Hi [First name], I put together answers to the questions people usually have at this point: [price / timeline / warranty, pick what fits]. Here they are: [link or attachment]. If something else is holding you back, just tell me. I'd rather know than guess."

Day 21 text: "Hi [First name], it's [Rep]. I haven't heard back, so I'm guessing the timing isn't right, and that's okay. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], when you and [Partner] talk it over, it might help to have it all in one place. Here's a short summary: what we found, the option we talked about, the price, and why we recommended it: [summary]. Happy to get on a quick call with both of you. [Day] at [time] or [day] at [time]?"

2. The price was higher than they expected

What's behind it: *They're not sure the value is worth the price yet, or they can't see how to pay for it. Don't drop the price. Explain it, and show payment options if your company offers them.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. I know the price was more than you expected. I'm sending a simple breakdown of what's included so you can see where every dollar goes. Could we take 10 minutes [day] or [day] to go over it?"

Day 2 text: "Hi [First name], quick thought on price: you said [the one thing]. The cheaper option usually [what it doesn't cover, in one line]. Here's a side-by-side of both: [link]. Which one fits better?"

Day 5 call:

1. "Hi [First name], it's [Rep]. Got two minutes?"
2. "Last time, the price was the sticking point. Is it the total, or the monthly amount?"
3. If total: walk through the breakdown and any smaller option. If monthly: walk through payment options your company offers.
4. "If we could get it to a number that works for you, would you want to move forward? Great, does [day] or [day] work to finalize it?"

Day 10 text or email: "Hi [First name], you said the price felt high. That's fair. Here's the straight answer on why it costs what it does: [2 to 3 sentences: materials, labor, warranty]. Here are the options we can do: [option list]. Want to talk through which one fits?"

Day 21 text: "Hi [First name], it's [Rep]. I know the budget was the hard part, and I don't want to keep bugging you. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], when you show [Partner] the price, this breakdown might help. It shows what's included and the payment options: [link]. If it's easier, I can walk you both through it in 10 minutes. [Day] at [time] or [day] at [time]?"

3. "I need to talk to my spouse or partner"

What's behind it: *Sometimes true, sometimes a polite way out. Either way, the fix is to talk to both of them, not to have the homeowner explain it secondhand.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. Rather than you having to explain everything to [Partner], could I walk you both through it? 15 minutes, by phone or in person. [Day] at [time] or [day] at [time]?"

Day 2 text: "Hi [First name], here's a one-page summary you can show [Partner]: what we found, the option you liked, the price and the timeline: [link]. Did [Partner] have any questions I can answer?"

Day 5 call:

1. "Hi [First name], it's [Rep]. Did you get a chance to talk with [Partner]?"
2. "What did [Partner] think? What questions came up?"
3. Answer each question. If they haven't talked yet: "Would it help if I explained it to [Partner] directly?"
4. "Let's get the three of us on a quick call. [Day] at [time] or [day] at [time]?"

Day 10 text or email (written so it can be forwarded): "Hi [Partner], [First name] and I looked at your [the project] on [date]. The main concern was [the one thing]. Here's what we recommended and why: [2 to 3 sentences], plus the price and options: [link]. I'd be glad to answer your questions directly. [Day] at [time] or [day] at [time]? – [Rep], [Company], [phone]"

Day 21 text: "Hi [First name], it's [Rep]. I know you and [Partner] are busy. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: this whole script set is the spouse version. Use the Day 10 message on Day 1 if [Partner]'s email or phone number is available and the homeowner says it's okay.

4. They want to get other quotes

What's behind it: *They want to be sure they're getting a fair deal. Help them compare the right things instead of just the price.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today, and smart move getting other quotes. I'm sending a short checklist of what to compare so you're looking at the same thing across quotes. Once you have them, can we do a quick call [day] or [day]?"

Day 2 text: "Hi [First name], here's the checklist: [materials and brand / what prep and removal are included / warranty on work and on product / who does the work / timeline / payment terms]. Ask every company the same questions: [link]."

Day 5 call:

1. "Hi [First name], it's [Rep]. How's the quote process going?"
2. "What have you seen so far that you liked or didn't like?"
3. Answer questions without putting other companies down.
4. "When will the other quotes be in? Let's set a time right after that to compare. [Day] or [day]?"

Day 10 text or email: "Hi [First name], by now you may have your other quotes. If any of them look cheaper, check whether they include [the items in ours that are often left out, list only what's true]. Happy to go through them side by side with you. [Day] at [time] or [day] at [time]?"

Day 21 text: "Hi [First name], it's [Rep]. You may have already picked someone, and that's okay. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], when you and [Partner] compare quotes, this checklist makes it easy to compare the same things: [link]. Want me to walk you both through ours? [Day] or [day]?"

5. "Not the right time" or "We want to wait"

What's behind it: *Sometimes a real date (after the holidays, after tax season, spring). Sometimes it's a soft no. A real date is not a no. Get the date.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. Totally understand wanting to wait. So I don't bug you too early, when would be a better time to pick this back up, [month] or [month]?"

Day 2 text: "Hi [First name], one thing to know while you wait: you mentioned [the one thing]. [One honest line on what waiting could mean for that, only if true, for example a leak getting worse.] No pressure, just want you to have the full picture."

Day 5 call:

1. "Hi [First name], it's [Rep]. Got two minutes?"
2. "You said now isn't the right time. What would need to change for it to be the right time?"
3. Listen. If it's a real date: "Got it. Can I put a note to call you [date]?" If it's something you can solve, solve it.
4. "Would it help to get on the schedule now for [month], so you have a spot when you're ready?"

Day 10 text or email: "Hi [First name], you mentioned [their timing, in their words]. I've put a note to reach out [one week before that]. If anything changes before then, just text me."

Day 21 text: "Hi [First name], it's [Rep]. I know you wanted to wait, and I'll respect that. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]". **Plus:** set a reminder one week before the date they named, with their exact words in it. Then text: "Hi [First name], back in [month] you said [what they said]. Here we are. Still want to get [the project] done? I've got [day] or [day]."

Spouse or partner version: "Hi [First name], when you and [Partner] decide on timing, here's a summary so you both have the details: [link]. Want me to call you both around [month] to plan it?"

6. They need to figure out the budget first

What's behind it: *They want the project but don't know how to fit it in. Make the numbers simple and give them choices.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. To make the budget part easier, I'm sending the options side by side, with the total and any payment options. Could we go over it for 10 minutes [day] or [day]?"

Day 2 text: "Hi [First name], one idea: if the full project is too much right now, we could [smaller first phase or option, only if real]. Here's what that would look like: [link]."

Day 5 call:

1. "Hi [First name], it's [Rep]. Did you get a chance to look at the budget?"
2. "What number would you be comfortable with, total or per month?"
3. Match an option to that number, or be honest if none fits.
4. "If that works, would [day] or [day] work to get it set up?"

Day 10 text or email: "Hi [First name], here's a simple sheet showing each option, what it costs and what you get: [link]. Which one is closest to what you had in mind?"

Day 21 text: "Hi [First name], it's [Rep]. I know working out the budget takes time. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], when you and [Partner] go over the budget, this sheet shows each option and payment choice side by side: [link]. Happy to answer questions for both of you. [Day] or [day]?"

7. Financing didn't work out, or the monthly payment was too high

What's behind it: *They wanted to do it but the payment didn't fit. Be respectful. Look for a real alternative.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for your time today. I know the financing piece didn't work out the way we hoped. I'm going to look at other options and get back to you by [day]."

Day 2 text: "Hi [First name], I looked into it. Here are the options that might work: [smaller project / different term / another lender / pay in stages, only what's real]. Want to go over them [day] or [day]?"

Day 5 call:

1. "Hi [First name], it's [Rep]. Got two minutes?"
2. "What monthly amount would feel comfortable?"
3. Show what fits that number, or be honest that nothing fits right now.
4. "Does that work? Then let's get it set up. [Day] or [day]?"

Day 10 text or email: "Hi [First name], one more option I wanted to share: [option]. If it's not the right time financially, that's completely okay. Just tell me and I'll check back when it makes sense."

Day 21 text: "Hi [First name], it's [Rep]. I know the numbers didn't line up yet. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here are the payment options in one place for you and [Partner]: [link]. Want to go over them together? [Day] or [day]?"

8. They want a smaller job or just a repair

What's behind it: *They want to solve the problem for less. Help them see both options honestly. A smaller job is still a job.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. I'm sending a side-by-side of the full project and the smaller option, so you can see what each one does and doesn't fix. Quick call [day] or [day] to pick one?"

Day 2 text: "Hi [First name], you said [the one thing]. Here's what the smaller option covers and what it leaves for later: [one line each]. Either way, I'm happy to help."

Day 5 call:

1. "Hi [First name], it's [Rep]. Did you get a chance to compare the two options?"
2. "Which one feels right for you?"
3. If smaller: price it and schedule it. If unsure: answer questions.
4. "Want to get it on the calendar? [Day] or [day]?"

Day 10 text or email: "Hi [First name], if the smaller option makes more sense right now, we can do that. Here's the price and timeline: [details]. Want me to set it up?"

Day 21 text: "Hi [First name], it's [Rep]. Whether it's the full project or the smaller fix, I'm happy to help. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here's both options side by side for you and [Partner]: [link]. Happy to walk you both through it. [Day] or [day]?"

9. They weren't sure they could trust us yet

What's behind it: *They liked the plan but don't know the company well enough. Proof and familiarity fix this, not pressure.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for having me over. I know choosing who to let into your home is a big decision. Here are our reviews and a few photos of similar projects nearby: [link]. Happy to answer anything."

Day 2 text: "Hi [First name], if it helps, here's how we handle [the thing they worried about: permits / cleanup / warranty / who does the work]: [one or two lines]."

Day 5 call:

1. "Hi [First name], it's [Rep]. Got two minutes?"
2. "What would you need to see or hear to feel comfortable with us?"
3. Give exactly that, only if true: license, insurance, warranty, a nearby finished project, reviews.
4. "Does that help? Would [day] or [day] work to get started?"

Day 10 text or email: "Hi [First name], one more thing that might help: [our warranty in plain words / license and insurance info / a finished project near you]. If you'd like, you can ask me anything at all. [Day] or [day]?"

Day 21 text: "Hi [First name], it's [Rep]. I know trust takes time. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here's our reviews, license and warranty info in one place, so [Partner] can look too: [link]. Happy to meet you both or hop on a call. [Day] or [day]?"

10. "Just email me the quote"

What's behind it: *Often a way to end the visit. The quote by itself rarely sells. Send it with a set time to go over it.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Here's your quote, as promised: [link]. It's easier to go over it together so nothing gets missed. 10 minutes [day] at [time] or [day] at [time]?"

Day 2 text: "Hi [First name], did the quote come through okay? The part most people ask about is [one line]. Any questions?"

Day 5 call:

1. "Hi [First name], it's [Rep]. Did you get a chance to look at the quote?"
2. "What stood out to you, good or bad?"
3. Answer each question. Find the real objection and use the matching script.
4. "Want to lock in a start date? [Day] or [day]?"

Day 10 text or email: "Hi [First name], I'm following up on the quote for [the project]. Here's a 3-line summary: [what it fixes / price / timeline]. Ready to move forward, or is there a question I can answer?"

Day 21 text: "Hi [First name], it's [Rep]. I sent your quote a few weeks ago and didn't want it to get lost. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here's the quote, with a short summary on top so [Partner] can read it quickly: [link]. Happy to go over it with both of you. [Day] or [day]?"

11. They had a bad experience with a contractor before

What's behind it: *They're afraid it will happen again. Show exactly how you prevent the thing that went wrong last time.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for telling me about [what went wrong before]. Nobody should go through that. I'm sending exactly how we handle that, step by step, so you know what to expect."

Day 2 text: "Hi [First name], here's what we do so [what went wrong] doesn't happen: [2 to 3 lines: written schedule, who's on site, cleanup, warranty]."

Day 5 call:

1. "Hi [First name], it's [Rep]. Got two minutes?"
2. "Last time, what would have made it go right?"
3. Show how you do that, only if true.
4. "Would it help to put that in writing in your contract? Great. [Day] or [day] to go over it?"

Day 10 text or email: "Hi [First name], here's our warranty and what happens if something isn't right, in plain words: [details]. You'd have my number the whole way through."

Day 21 text: "Hi [First name], it's [Rep]. I understand if you're still not ready after what happened before. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here's how we handle [what went wrong before], so [Partner] can see it too: [link]. Happy to answer both of your questions. [Day] or [day]?"

12. They might sell or move

What's behind it: *They're not sure the project pays off if they leave. Help them see both sides honestly, without promising resale value.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. Makes sense to think about it if you might move. When do you expect to know?"

Day 2 text: "Hi [First name], if you do sell, here's a smaller option that fixes [the one thing] without the full project: [details]. If you stay, the full project is here: [link]."

Day 5 call:

1. "Hi [First name], it's [Rep]. Any update on whether you're staying?"
2. "If you stay, what would you want [the project] to look like?"
3. Offer the option that fits their timeline.
4. "Want me to check back [date], or get the smaller option scheduled now?"

Day 10 text or email: "Hi [First name], just checking where you landed on the move. Either way, here are both options: [link]."

Day 21 text: "Hi [First name], it's [Rep]. I know you may be moving. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]". **Plus:** set a reminder for the date they named.

Spouse or partner version: "Hi [First name], here are both options, stay or sell, so you and [Partner] can decide together: [link]. Want to go over them? [Day] or [day]?"

13. They want to do it themselves or have a family member do it

What's behind it: *They want to save money. Respect it. Be helpful and leave the door open.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today, and good luck if you take it on yourself. If you want, I'll send a short list of what to watch out for on a [the project]."

Day 2 text: "Hi [First name], here's the list: [3 to 5 honest points: permits, warranty, tools, time]. If any part turns out to be more than you want to take on, we can do just that part."

Day 5 call:

1. "Hi [First name], it's [Rep]. How's the planning going?"
2. "Is there any part you'd rather not do yourself?"
3. Offer to price just that part.
4. "Want me to put that part on the schedule? [Day] or [day]?"

Day 10 text or email: "Hi [First name], if it'd help, we can handle just [the hardest part] and leave the rest to you. Here's the price: [details]."

Day 21 text: "Hi [First name], it's [Rep]. Hope the project's going well. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here's the full option and the just-the-hard-part option, so you and [Partner] can compare: [link]. [Day] or [day] for a quick call?"

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14. They couldn't decide on the product, style or options

What's behind it: *Too many choices. Make the decision smaller.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. To make it easier, I narrowed it down to the 2 options that fit what you told me you wanted: [link]. Which one do you like better?"

Day 2 text: "Hi [First name], here are photos of both options on real projects: [link]. You said you wanted [what they said]. Option [A/B] fits that best."

Day 5 call:

1. "Hi [First name], it's [Rep]. Did one of the two options stand out?"
2. "What do you like about it? What's still bugging you?"
3. Answer, or offer a quick visit or showroom stop with samples.
4. "Want to lock in that choice and get on the schedule? [Day] or [day]?"

Day 10 text or email: "Hi [First name], here are the 2 options side by side with prices: [link]. If you pick one this week, I can [real next step, for example order samples or hold a start date]."

Day 21 text: "Hi [First name], it's [Rep]. I know picking options takes time. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here are the 2 options with photos so you and [Partner] can pick together: [link]. Happy to bring samples by for both of you. [Day] or [day]?"

15. "Call me later" with no set time

What's behind it: *No next step was set. Use the "call me later" rule from page 1: turn it into a day and time.*

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. You said to call you later. So I don't catch you at a bad time, what's better, [day] at [time] or [day] at [time]?"

Day 2 text: "Hi [First name], just want to get a time on the calendar so I'm not chasing you. [Day] at [time] or [day] at [time]?"

Day 5 call:

1. "Hi [First name], it's [Rep]. You asked me to call you back, is now still okay?"
2. "Where are you at on [the project]?"
3. Find the real objection and use the matching script.
4. "What's the next step that makes sense? [Day] or [day]?"

Day 10 text or email: "Hi [First name], I tried to reach you to follow up on [the project]. If now's not a good time, just reply with a day that works and I'll call you then."

Day 21 text: "Hi [First name], it's [Rep]. I haven't been able to reach you, so I'm guessing the timing isn't right. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], when's a good time to talk with you and [Partner] together? [Day] at [time] or [day] at [time]?"

Any other objection (general scripts)

Write their exact words at the top. Use these general scripts:

Same-day text: "Hi [First name], it's [Rep] from [Company]. Thanks for today. You mentioned [what they said]. I'm putting together an answer on that and will send it by [day]. Could we take 10 minutes [day] or [day] to go over it?"

Day 2 text: "Hi [First name], here's what I found on [what they said]: [one or two lines]."

Day 5 call:

1. "Hi [First name], it's [Rep]. Got two minutes?"
2. "Last time you said [what they said]. Is that still the main thing?"
3. Answer it.
4. "Does that clear it up? [Day] or [day] to get started?"

Day 10 text or email: "Hi [First name], when we talked you said [what they said]. Here's the straight answer: [2 to 3 sentences]. If that helps, [day] or [day] to move forward?"

Day 21 text: "Hi [First name], it's [Rep]. I haven't heard back. Can you reply with one word? YES: let's get it on the calendar. LATER: tell me when and I'll check back then. NO: I'll close your file and stop reaching out. Thanks either way. – [Rep]"

Spouse or partner version: "Hi [First name], here's a short summary so [Partner] has the details: [link]. Happy to talk with both of you. [Day] or [day]?" ---