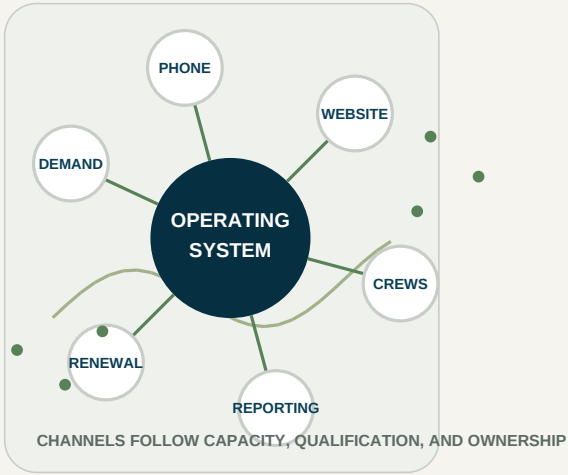


AI & AUTOMATION

Estimate Follow-Up Automation for Landscaping Sales

A sales sequence that keeps the estimator accountable and gives the prospect a clear next step.



THE CONSTRAINT

Automatic reminders do not fix a weak estimate, unclear scope, or missing sales owner. The sequence should support the estimator with timing, proof, and task discipline, then stop when a decision is made.

USE THIS WHEN

Use this when estimates are sent consistently but follow-up depends on memory.

DO NOT START HERE

Do not automate around unresolved scope, pricing errors, or a client complaint.

Inputs to gather before the first meeting

- 1 Estimate sent and viewed stages
- 2 Service-specific objections
- 3 Estimator ownership
- 4 Win, loss, and no-response rules

The five-step playbook

Run the steps in order. A channel should never move faster than the operation that receives the work.

01 Define the sales stages

Use sent, viewed, question, revision, verbal decision, won, lost, and dormant. Automation depends on stage accuracy.

02 Write service-specific follow-up

Design-build prospects need process and project proof. Maintenance buyers need scope, communication, and start readiness. One sequence does not fit every sale.

03 Combine messages and tasks

Use email or SMS for clear reminders, but create human tasks for high-value or active opportunities.

04 Use decision-based timing

Time follow-up from estimate delivery, viewing, questions, or promised decision date rather than sending the same schedule to everyone.

05 Stop cleanly

End the sequence when the prospect wins, loses, opts out, requests a pause, or needs a human resolution.

Measure the operating result

These measures keep the playbook tied to booked work, delivery capacity, and client retention.

01

Estimates followed on time

02

Reply rate

03

Estimate-to-job rate

04

Days to decision

Thirty-day rollout

WEEK 1

clean stages and ownership.

WEEK 2

write service sequences.

WEEK 3

connect messages, tasks, and stop rules.

WEEK 4

launch with estimator review.

Stop and scale rules

- The estimator remains the owner.
- Automation follows stage and service context.
- No sequence continues after a clear decision.

Launch checklist

- ☐ Stages accurate
- ☐ Owners named
- ☐ Messages approved
- ☐ Human tasks included
- ☐ Stop reasons mapped
- ☐ Weekly pipeline review active

One playbook fixes one constraint. We run the whole growth system. AI, website and reporting from \$2,000/mo. Ad spend is excluded.

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