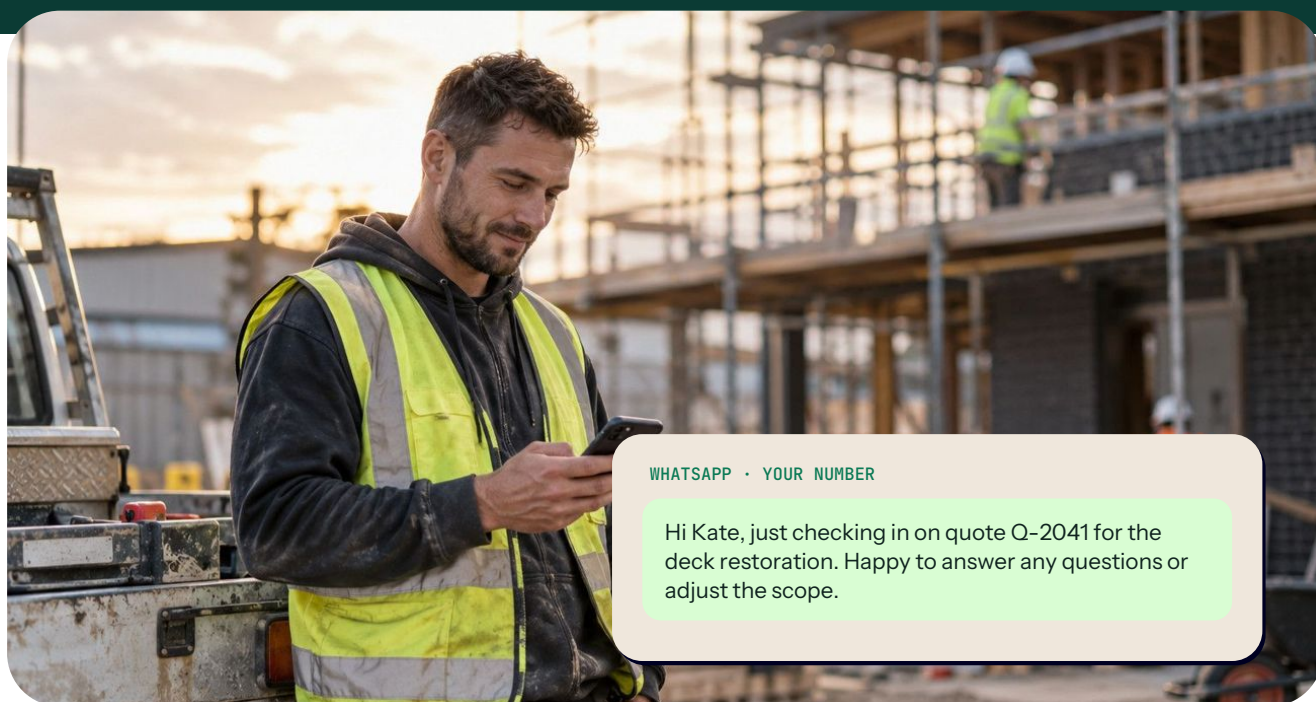


Chase every quote without chasing anyone.

Follow up every quote automatically on WhatsApp with a question they can answer in seconds, and stop the moment they reply.



INSIDE THIS GUIDE

- The moment and why it slips
- A sample conversation
- Message templates to adapt
- Node-by-node build
- How the journey works
- The data you need
- Example sheet
- What to measure

01

At a glance

TEAM

Sales

STARTS FROM

Google Sheets, Zapier

TRIGGER

A quote row is added to your sheet when the quote is sent (from your quoting tool, CRM export or manually).

GOAL

More quotes getting a decision, fewer lost to silence.

STOPS WHEN

Reply received, quote marked accepted or declined in the sheet, opt-out, or two follow-ups sent.

LIKELY META CATEGORY

Utility. Meta confirms it when it reviews your template.

02

In practice

Quotes rarely get a “no”. They get silence, usually because the customer has a question or a competing quote. A friendly check-in two days later, and a last one offering to adjust the scope, gets many of those quotes to a decision without anyone on your team having to remember to chase.

03

The moment

THE MOMENT

You sent eight quotes last week. Nobody has followed any of them up.

WHY IT SLIPS TODAY

Following up quotes is the task everyone means to do and nobody has time for. Quotes quietly expire, and customers go with whoever checked in.

WHAT CHANGES

More quotes getting a decision, fewer lost to silence.

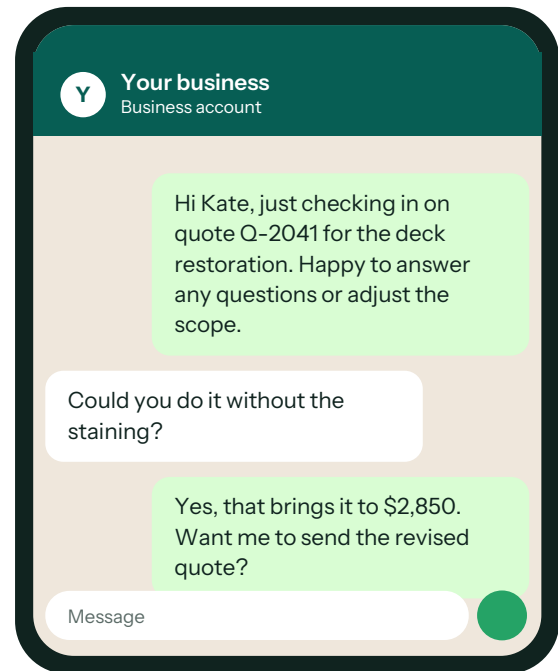
04

How the journey works

The steps on the left, and what your customer sees on the right.

Trigger: A quote row is added to your sheet when the quote is sent (from your quoting tool, CRM export or manually).

- 1 **Wait**
Two days after the quote is sent.
- 2 **Check in**
A friendly question: any questions, or would they like to go ahead?
- 3 **Wait again**
Three more days.
- 4 **Final**
A last check-in, offering to adjust the quote or close it off.
- 5 **Notify**
Any reply alerts the person who wrote the quote.



A fictional example. Write templates in your own voice and get them approved by Meta.

Stops when

Reply received, quote marked accepted or declined in the sheet, opt-out, or two follow-ups sent.

05

Data you need

Each item is a column in your Google Sheet, a field from Zapier or a Shopify property. Only the WhatsApp number is required.

- First name
- WhatsApp number
- Quote number or job
- Quote amount
- Date sent

06 Set it up in ConvoHut

- [] Add a row for each quote sent (or connect your quoting tool through Zapier).
- [] Create two follow-up templates.
- [] Add a status column so accepted quotes exit the journey.
- [] Set notifications to the quote owner.
- [] Test with a sample quote.

07 The message sequence

Example templates. {{variables}} are filled from your sheet or store. Submit each one to Meta for approval.

1. 2 days after the quote

UTILITY · quote_checkin_v1

Hi {{first_name}}, just checking in on quote {{quote_no}} for {{job}} ({{amount}}). Happy to answer questions or adjust the scope.

Buttons: Go ahead | I have a question

2. 3 days later, if no reply

UTILITY · quote_last_v1

Hi {{first_name}}, would you like us to hold quote {{quote_no}}, change it, or close it off? Any answer helps.

Buttons: Hold it | Change it | Close it

08 Example sheet

Only the phone column is required. Example data only.

first_name	phone	quote_no	job	amount	status
Kate	+614... ..	Q-2041	Deck restoration	\$3,250	sent
Raj	+614... ..	Q-2042	Fence, 18m	\$4,900	sent
Amy	+614... ..	Q-2043	Pergola	\$7,400	accepted

09 Build it in ConvoHut, node by node

TRIGGER	New Sheet Row	One row per quote sent.
WAIT	2 days	
CONDITION	status is still "sent"	Accepted or declined quotes exit here.
SEND MESSAGE	quote_checkin_v1	
WAIT FOR REPLY	Timeout: 3 days	
NOTIFY ME	On reply	The quote owner is alerted.
SEND MESSAGE	quote_last_v1	Timeout path only.
END FLOW		

10 Branches

ON REPLY

The person who wrote the quote is alerted and replies with the answer or revised price.

ON TIMEOUT

After the second follow-up the journey ends. Update the status column so reporting stays accurate.

ON OPT-OUT

The contact leaves the journey and is excluded from future marketing messages.

11 Mistakes to avoid

- Chasing more than twice.
- Not updating status, so accepted quotes get chased.
- Offering a discount before asking what's holding them back.

12 Measure and improve

What to measure

- Quotes followed up
- Replies to follow-ups
- Quotes accepted after follow-up
- Average days to decision

Good practice

- Follow up twice, not five times.
- Offer to adjust, not just to accept.
- Update the sheet status so people don't get chased after saying yes.

13

Variations to try

- Trades and construction
- Event venues and caterers
- Print, signage and manufacturing
- Professional services

14

Questions

Can the journey stop when a quote is accepted?

Yes. Add a status column; when it changes, the customer leaves the journey.

What if my quotes are in a CRM?

Export them to a sheet, connect through Zapier, or ask about a custom integration on Enterprise.

15

Responsible messaging

Consent first

Only message people who have given you their WhatsApp number and agreed to hear from you. Include a clear way to opt out of marketing messages, honour opt-outs immediately and keep sensitive personal details (such as health information) out of messages.

16

Your next steps

1

Pick a journey

Choose the follow-up with the clearest goal for your business.

2

Connect your data

A Google Sheet, Zapier app or Shopify store. Only the phone number is required.

3

Go live in a week

Get templates approved, test with your own number and switch it on.

READY TO START?

Start your 7-day free trial

Free onboarding, training and Meta verification help on every plan. Connect your number in about 15 minutes.

dashboard.convohut.com · Book a demo: convohut.com/demo