

PRINTABLE WORKSHEET

Quote follow-up workflow checklist

Map one post-quote handoff before automating another message. Use sanitized operating facts, not customer secrets or imagined revenue.

EVIDENCE BOUNDARY

A sent quote, opened message, reply, proposal, invoice, or pending transfer is not settled revenue. This worksheet is not a client result, legal opinion, or communications-law opinion.

QUOTE TYPE

APPROVED CHANNEL

ACCOUNTABLE OWNER

REVIEW WINDOW



01

Confirmed send

Current version, recipient, allowed channel, send time, and validity window are recorded.



02

Eligibility

Declined, disputed, expired, duplicate, wrong-contact, opted-out, and already-answered quotes are excluded.



03

Owner and next date

One role has accepted the quote and one visible decision date or owned waiting state exists.



04

Context check

Open questions, revisions, deadlines, prior replies, permissions, and stop signals are checked.



05

Approved next action

The next reminder, question, call task, or wait is relevant, truthful, and permitted.



06

Reply and exception route

Replies stop automation; price, scope, complaints, disputes, and sensitive cases reach a person.



07

Reconciled outcome

The quote ends as accepted next step, revision, explicit close, expiration, or owned wait.

DECISION PAGE

Decide what may move - and what must stop.

A safe workflow gives routine work a visible path while keeping judgment, consent, pricing, and exceptions with an accountable person.

PREPARE OR ROUTE

- ☐ Create the task and accepted owner.
- ☐ Prepare an approved draft.
- ☐ Calculate age and surface exceptions.

REQUIRE HUMAN REVIEW

- ☐ Price, discount, scope, or contract terms.
- ☐ Scheduling promises and sensitive replies.
- ☐ Any ambiguity about permission or facts.

STOP IMMEDIATELY

- ☐ Reply, opt-out, complaint, or dispute.
- ☐ Wrong contact, expired quote, or duplicate.
- ☐ Credential, payment, identity, or safety data.

MEASURE OPERATING EVIDENCE

SIGNAL	DEFINITION	BASELINE	REVIEW
Owner coverage	Eligible quotes with one accepted owner and next date.	_____	_____
Context-ready rate	Quotes ready for a useful next action without reconstructing facts.	_____	_____
Overdue state age	Time beyond the approved review date; age never authorizes repeated contact.	_____	_____
Reply reconciliation	Replies routed to an owner and reflected in the quote state.	_____	_____
Outcome completeness	Accepted next step, revision, close, expiration, or owned wait recorded.	_____	_____

ONE-WEEK AUDIT

Days 1-2: sample and sanitize. Day 3: map ownership and stops. Day 4: define allowed actions and measures. Day 5: test one small correction. Days 6-7: review exceptions before connecting another tool.

Next: score one workflow privately

<https://audit.ariiaops.com/scorecard?src=quote>

USD \$497 covers one workflow; implementation is separate.

Fit review requires explicit consent. No purchase or outcome is guaranteed.