

The Inquiry Follow-Up Checklist

A practical guide for U.S. local service businesses

01 RESPOND WITH CARE

- ☐ Acknowledge the message and use the customer's name when available.
- ☐ Reflect the request in your own words so they know you understood.
- ☐ If you need time to check, give a realistic time for your next reply.

02 CLARIFY THE REQUEST

- ☐ Confirm the service, location, timing, and details you need to assess the job.
- ☐ Ask only what you need to decide whether the work is a fit and prepare a next step.
- ☐ Be clear if you do not serve the area or cannot take on the work.

03 MAKE THE NEXT STEP CLEAR

- ☐ Explain what happens next: a call, visit, estimate, or another question.
- ☐ Offer a realistic time window; confirm before promising a specific time.
- ☐ Share anything the customer should prepare, if needed.

04 KEEP THE LOOP MOVING

- ☐ Record the inquiry and next action in the system you already use.
- ☐ Set a reminder for any follow-up you promised, then do it.
- ☐ After an estimate or visit, check in at the agreed time and invite questions.
- ☐ Close the loop when the customer decides or no longer needs help.

QUICK REVIEW

- ☐ Did I answer the question they actually asked?
- ☐ Is my next step specific and realistic?
- ☐ Have I recorded what I need to remember?

Thoughtful follow-up can make communication clearer. This checklist does not guarantee leads, appointments, or jobs; customer demand, fit, timing, and price also matter.