Clear quotes. Steady routines.

A practical workbook for small residential cleaning businesses.



Start with one unanswered quote

Check the scope, choose a suitable follow-up and record one next action. Then build a local marketing plan that fits your real capacity.

Three tools included

Use the editable Plan Builder, Quote Follow-Up Builder and Quote-to-Booking Tracker from the kit. Open the HTML files in a browser. Save on your device only when you choose; export JSON for a backup.

A useful boundary

Use reference IDs in the tracker. Keep customer names, addresses, access details and payment information in your existing customer system. The tools do not send messages or sync accounts.

The cover is an AI-generated illustration, not a customer case study. All example numbers are fictional. No traffic, booking or revenue result is promised.

A completed example

Palm Grove Home Cleaning is fictional. Its small team wants a manageable recurring schedule in two neighboring Palm Beach County areas. Replace these details with your own.

Audience

Households seeking regular maintenance of kitchens, bathrooms and floors.

Problem and offer

Customers need a dependable routine and a clear scope. Offer a scoped first clean and an optional every-two-weeks maintenance quote.

Capacity and next step

At most four new recurring households if the actual schedule supports it. Ask prospects to request a quote with area, home size, condition and preferred frequency.

Channel and budget

An accurate local profile plus a permitted community post. Illustrative cap: $150 cash and four hours of owner time; neither amount is a required minimum.

Four-week rhythm

Week 1: clarify the offer. Week 2: reach one area. Week 3: follow up appropriately. Week 4: review bookings and delivery capacity.

Example arithmetic

20 qualified enquiries to 10 quotes to 4 first bookings to 2 recurring bookings.
Quote-to-first booking: 4 / 10 = 40%.
First-to-recurring booking: 2 / 4 = 50%.
Cash cost per first booking: $150 / 4 = $37.50, excluding owner time.

These are sample calculations, not benchmarks. Booked work is not completed work or collected revenue.

Your one-page plan

1. Who is your service for, and what do they need?

2. Which areas and available appointments can you serve?

3. What is included, excluded and separately quoted?

4. What is the offer and the next action?

5. Which one channel will you test?

6. What are your cash and time limits?

7. Review date and useful measures:

Three messages that clarify

Use these for people who requested a quote or agreed to continue the conversation. Respect the chosen contact channel, actual permissions and stop requests. Replace every bracketed field.

1 / Send the quote

Hi [first name], thanks for sharing the details of your home. Your [service] quote is [amount] for [included scope]. [Exclusions] are separate. [State any assessment conditions.] Our current options are [real availability]. If the scope looks right, [booking action]. If I missed an area you want included, reply and I will clarify before you decide. - [business]

2 / Clarify an unanswered quote

Hi [first name], did the [service] quote answer what you wanted to know? I can clarify the included rooms, any add-ons or the scheduling options. Are you ready to choose a time, or is there one detail you would like me to explain? - [business]

Suggested review: 24-48 hours, unless you agreed on another date. Continue an existing conversation instead of sending a duplicate reminder.

3 / Respond to a price concern

Thanks for letting me know. The quote includes [scope] and [relevant detail]. If you want a smaller scope, we can discuss [real alternative] and price that separately. I do not want to remove work you expect without making that clear. Would you like to keep the original scope or explore the smaller option? - [business]

Check labor, supplies, travel and overhead before changing a price. A smaller scope must be a service you can actually deliver.

Close the loop. Offer the next step.

4 / Close the quote follow-up

Hi [first name], I will close this quote follow-up for now so I do not keep messaging. If you would like to revisit [service], reply and I will check the current scope, price and availability with you. Thanks for considering [business].

Suggested final review: 5-7 days, if appropriate. Do not invent an expiry date or limited availability. Stop after a decision or opt-out.

5 / Offer recurring cleaning

Hi [first name], how did the first clean work for you? Please tell me if anything needs attention. If ongoing help would be useful, we can quote [frequency] maintenance cleaning with [scope] at [price] per visit. The first available recurring option is [real date]. Would you like the written details? - [business]

Resolve service concerns first. Asking for details is not agreement to a recurring booking. Confirm scope, price, frequency and start date explicitly.

Optional AI drafting prompt

Rewrite this follow-up warmly and concisely. Preserve the exact scope and price. Ask one question. Do not invent availability, reviews, guarantees or discounts. Keep personal information as placeholders. Draft only; do not send.

The question customers keep asking:

One detail I need to clarify in my quote:

Build a recurring offer

Separate the initial deep clean from the maintenance scope. Make the schedule, exclusions and change policy understandable before a customer accepts.

Maintenance rooms and tasks included:

Exclusions and separately priced work:

Frequency, actual price per visit and available start date:

How rescheduling, cancellation and access are handled:

Direct labor + supplies + travel cost per visit:

What remains before overhead, acquisition costs and taxes:

Illustration: $180 price - $115 direct costs = $65 before overhead and other costs. A $20 discount reduces that to $45. Replace these amounts with your own.

Every two weeks is about 26 visits per year, not exactly two per calendar month. Count accepted bookings, completed visits and payments separately.

Your four-week action plan

Week 1 / Make the offer clear

[ ] Review five recent enquiries and list repeated questions.
[ ] Define scope, exclusions, capacity and reply hours.
[ ] Test the quote path on a phone.
Done when: a prospect understands the service and how to request a quote.

Week 2 / Reach one relevant area

[ ] Check your actual service area and local profile.
[ ] Create one useful service explainer with approved images.
[ ] Share one post where business promotion is permitted.
Done when: links work and each enquiry has a recorded source.

Week 3 / Help people decide

[ ] Review open quotes before sending any message.
[ ] Clarify scope, price or scheduling questions.
[ ] Record a status and next action for each quote.
Done when: the appropriate next step is visible for every open conversation.

Week 4 / Review the evidence

[ ] Count qualified enquiries, quotes and bookings separately.
[ ] Check completed visits, payments and delivery time.
[ ] Ask first-visit customers about their experience.
Done when: you choose one next change and confirm available capacity.

Use real work photos with permission. Ask for honest reviews without rewards or screening for only positive feedback. Keep referral requests separate from review requests.

Review what actually happened

Period and primary channel:

Qualified enquiries: ____ Quotes sent: ____

First bookings: ____ Recurring bookings: ____

Completed visits: ____ Payments collected: ____

Cash spent: ____ Owner time: ____

Repeated customer question or reason for declining:

One change for the next test, owner and review date:

Rates: first bookings / quotes; recurring bookings / first bookings. Use the same period and definitions. With a zero denominator, mark the rate unavailable. A small sample is a clue, not proof of causation.

Reference guidance: Google service-area rules (support.google.com/business/answer/9157481); Google review guidance (support.google.com/business/answer/3474122). Original MarketingCoach templates. Use within your business; no resale.