

The Open-Quote Call List

Count the quotes you presented 14 or more days ago that still have no decision, see which nobody chased, and print a call sheet.

The Revvy team · October 8, 2026

In ten minutes: A count and total of your stale open quotes, a one-time figure at a rate you chose, and a printed call sheet to fill in, highest value first.

A quote nobody answered and nobody chased is still open. The truck has already rolled and the diagnosis is done; what is left is a phone call.

This worksheet helps you count the open quotes old enough to call and the ones nobody has chased, works out a one-time figure on them at a rate you choose, and prints a call sheet to work from.

What you get

About ten minutes with one export gets you:

- A count of your stale open quotes: still open, and presented 14 or more days ago.
- What they add up to, and the average quote among them.
- How many of them nobody has chased, read from the follow-up dates you already keep.
- A one-time figure at a recovery rate you choose, as a range, with the working printed beside it.
- A call sheet to print and fill in by hand. It asks for the quote number and never for the customer's name.

There is nothing to install and no sign-up. The worksheet does its sums in your browser. Nothing you type is saved or sent, and it clears when you reload the page.

Before you start: one export

Run your field-service software's estimate report, or open whatever list your office keeps of the quotes it has given. For every quote still open you need three things:

- The date the customer was given the quote.

- The amount.
- The last date anyone followed it up, if anyone did.

A spreadsheet works, and so do a printed list and a pen. If your system has no follow-up date, do Steps 1, 2 and 4 today and start recording follow-ups now (see Write this down from now on).

Not sure what your system keeps? The [Records Checklist](https://revvyrocket.com/resources/records-checklist/) (<https://revvyrocket.com/resources/records-checklist/>) goes through the estimate fields one by one. If you run several locations, work through each location's quotes on its own, so each office ends up with its own call sheet.

Step 1: find the stale quotes

A stale quote is still open and was presented at least 14 days before the date of your export. Quotes already sold, lost or expired stay out, and so do the newer open ones.

The newer ones are left out on purpose. A quote presented on Tuesday is still being decided, and counting it as unworked reads a busy week as lost work. Two weeks gives an ordinary decision time to happen first. The 14 days are Revvy's default. Every default on this page (14 days, and the 15% recovery rate in Step 4) is Revvy's judgement, not an industry figure, and you can change any of them.

A stale quote

status is open, and presented date $\leq$ export date - 14 days

The worksheet below works out the cut-off date from the date of your export.

Step 2: count them and add them up

Count the stale quotes and add up their amounts. The worksheet works out the average from those two numbers:

Average stale quote

total value $\div$ number of stale quotes

Then sort the list: largest amount first and, where amounts tie, the oldest quote first. That order is your call sheet.

Fewer than 5?

Under 5 stale quotes the worksheet puts no figure on them, because Revvy does not: below five, a figure is mostly noise. Work the list anyway. Every quote on it can still be called.

Step 3: mark the ones nobody chased

Look at the follow-up date on each stale quote. A blank one means nobody has recorded a second contact. Revvy reads it the same way: a blank follow-up date on an open quote is the signal its follow-up check looks for.

Count those quotes and add up their amounts. They are already among the stale quotes you counted in Step 2.

The split shows where to look. If most stale quotes have a follow-up and still no decision, the chasing is happening and the quotes are not closing. If most have none, nobody has worked them yet.

Step 4: put a figure on it, with your own rate

The worksheet multiplies your stale quotes by their average value and by a recovery rate: the share you expect to close after a deliberate second call. It starts at 15%, Revvy's default. Use your own rate if you have one.

Revvy set that default low on purpose. Open quotes are the cheapest finding it produces and the easiest one to oversell.

Put a figure on your open quotes

Your numbers

Count from your own estimate export, using the cut-off date the worksheet gives you.

Nothing you type here is saved or sent. It clears when you reload the page.

Date of your export

Stale open quotes

Cut-off, 14 days before your export date:

Still open, and presented at least 14 days before your export. Newer quotes are still being decided, so they stay out.

What they are worth in total (\$)

Recovery rate you expect on a deliberate second call (%)

Revvvy's default is 15%, a judgement and not an industry figure. Use your own.

Of those, quotes with no follow-up on record

What those are worth in total (\$)

A blank follow-up date counts as no follow-up. Optional.

Your one-time figure

Average stale quote

Mid-point

Range

Quotes nobody chased

Average = total value ÷ number of stale quotes

Mid-point = stale quotes × average value × recovery rate

Range = mid-point ± the band below

Under 30 stale quotes the band is ±45%; from 30 it is ±30%; from 60 it is ±20%.

One-time, from the quotes on file today. Revenue, not profit.

Call sheet

Sort your stale quotes by value, then by age, and work down the list. Write down the date of every call.

Quote no.	Presented	Amount	Last contact	Next step	Outcome

Quote numbers, not names: this sheet never asks who the customer is. The printed sheet has 25 rows.

How to read the result:

- The figure is one-time. These quotes exist today and do not come back every year, so the worksheet never scales them to a year.
- It is revenue, not profit.
- The range is Revvy's band around the mid-point. Its width depends on how many quotes you counted, not on the rate you chose: $\pm 45\%$ under 30 stale quotes, $\pm 30\%$ from 30, $\pm 20\%$ from 60.
- The quotes nobody chased are part of the figure, not extra. Do not add the two.
- The mid-point is what your inputs multiply to. It is not a forecast of what the calls will bring in.

Step 5: work the call sheet

Fill in one row of the call sheet for each stale quote, in the order from Step 2. The sheet sits at the foot of the worksheet above and prints with 25 rows.

What goes in each column of the call sheet

Column	What to write
Quote no.	The number from your system. The sheet never asks for the customer's name, so it can sit on a desk.
Presented	The date the customer was given the quote.
Amount	The quoted amount.
Last contact	The last follow-up date, or blank if there was none.
Next step	What you plan to offer on the call, or the date to try again.
Outcome	Sold, lost, still deciding or no answer, with the date.

Put the date of every call into your system as well as onto the sheet. That date is what Step 3 reads next time.

A reason-led second call

Have a reason for the call before you dial. An outline to adapt to your trade and your own words:

1. What has changed since the visit, if anything has: the season, the schedule, the parts.
2. What is still open: the problem the quote was for, and the options you gave.
3. A clear next step: a start date, a smaller option, or a time to call back.
4. Write down the outcome, even when it is "no answer".

Nothing here says how often a second call works, and the 15% in Step 4 is a judgement. Your outcome column can measure it for your own business. Keep it for a month, work out the share of called quotes that sold, and use that as your rate next time.

Write this down from now on

Record the date of every follow-up against the quote, in your system's follow-up field if it has one. With that one date on file, next month's count is a filter on three columns rather than a hunt through notes: still open, presented before the cut-off, follow-up blank.

Keep the open quotes in your records, too. Closing them out to tidy the list throws away the list this worksheet works from.

These are the same columns Revvy reads from an estimates file: the amount, the status, the presented date and the last follow-up date.

The same check in the demo

Demo

Contoso Plumbing & Drain

Contoso Plumbing & Drain is one of Revvy's demo businesses. Its open quotes still sitting unanswered add \$47K–\$71K, one-time, to Contoso's total.

Most of Contoso's open quotes have no follow-up on record.

In Revvy, the check opens to its working: the formula, the stale quotes it counted, their average value, the recovery rate and the range.

Open Contoso's action plan in the demo (https://app.revvYROCKET.com/business/biz_contoso/opportunities).

What Revvy adds

- It runs both checks on every analysis, from an estimates file. CSV import works today; ServiceTitan and Housecall Pro connections are planned.
 - It counts the quotes nobody chased once, inside the open-quote figure, and shows their share on a card of its own.
 - It gives each figure a confidence and a low, mid-point and high, and every figure opens to its working.
 - It keeps one-time figures apart from yearly ones, so a pile of quotes is never added to a year.
 - It also measures your close rate on decided quotes, sold and lost only, which this worksheet does not.
- Why open quotes stay out of a close rate (<https://revvyrocket.com/blog/close-rate-decided-quotes/>).

WORKSHEET AND CHECKLIST

The Booking-Rate Check →

One measured booking rate, a marked-up intake checklist, and a scenario in the calculator.