

Quote to Paid – 16 AI Prompts for Trade Businesses

Quotes, follow-ups, reviews and payment reminders – copy, fill in, send.

16 copy-paste prompts for the four jobs that eat most office time in a small trade business: **quotes, follow-ups, reviews, getting paid**. Works with any chat assistant (ChatGPT, Claude, Gemini, Copilot – free tiers are enough).

Licence: For use in your own business only (one company, all your staff). No resale, no sharing or redistributing the prompts as your own product.

Not legal or tax advice. Check local rules on late fees, collections and tax before sending payment reminders.

How to use this pack (read once, 2 minutes)

1. **Copy a prompt**, paste it into your AI chat.
2. **Replace everything in `{{double curly braces}}`** with your own details. Delete lines you don't need.
3. **Read the answer before you send it.** The AI writes; you are responsible for prices, dates and promises.
4. **Keep it private.** Don't paste customer bank details, ID numbers or anything you wouldn't put on a postcard. First name + job address street is enough for most prompts.
5. **Save your "Business profile" once** (Prompt 0) and paste it at the top of any prompt – the answers will sound like you.

Tone tip: If an answer sounds too formal, reply with *"Shorter, plainer, like a tradesperson texting a customer."*

Prompt 0 – Your business profile (fill in once, reuse everywhere)

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Here is my business profile. Use it for every text you write for me in this chat.
- Business name: {{e.g. Hart Plumbing & Heating}}
- Trade: {{plumber / electrician / roofer / painter / carpenter / ...}}
- Area I work in: {{town or county}}
- Who I am: {{e.g. owner, 12 years in the trade, small team of 3}}
- How I want to sound: friendly, direct, no jargon, no exclamation marks, short sentences
- Contact line for the end of messages: {{phone}} · {{email}} · {{website if any}}
- Things I never promise: {{e.g. fixed start dates before a site visit, prices by phone}}
Confirm with one line "Profile saved" and wait for my next request.
```

A. Quotes & estimates

Prompt 1 – Turn rough site notes into a clear quote text

I've done a site visit. Turn my rough notes into a clear, professional quote description the customer can understand.

Customer first name: {{name}}

Job: {{e.g. replace bathroom radiator and thermostatic valve}}

My notes (messy is fine): {{paste notes}}

My prices (use exactly these, do not change or add numbers): {{line items with price}}

VAT / tax note: {{e.g. prices include 20% VAT / prices exclude sales tax}}

Valid for: {{e.g. 30 days}}

Write: 1) a two-sentence summary of the job, 2) a numbered list of work steps in plain words, 3) what is NOT included, 4) the price lines exactly as given, 5) one short closing sentence on how to accept.

Do not invent any prices, dates, guarantees or materials I didn't mention. If something is unclear, list it under "Questions for me" at the end instead of guessing.

Prompt 2 – "What's not included" list (prevents arguments later)

For this job: {{job description}}

List the 6–10 things customers in my trade most often assume are included but usually aren't (e.g. making good plaster, disposal of old parts, permits). Write each as one short plain sentence I can paste into my quote under "Not included unless agreed". Mark any item that depends on local rules with "(check locally)".

Prompt 3 – Explain two options (good / better)

The customer can choose between two options:

Option 1: {{description + price}}

Option 2: {{description + price}}

Write a short, honest comparison (max 120 words) that helps the customer choose. Cover: what they get, how long it lasts or how often it needs attention (only if I stated it: {{lifespan info or "not stated"}}), and who each option suits. No pressure selling. Keep my prices exactly as given.

Prompt 4 – Reply to "Can you give me a price over the phone?"

A customer asked for a price without a site visit. Job: {{job}}.

Write a friendly reply (text message, max 70 words) explaining why I need to see it first, offering {{e.g. a free 20-minute visit / a photo-based rough range}}, and giving two time slots: {{slot 1}}, {{slot 2}}.

B. Follow-ups (quotes that went quiet)

Prompt 5 – First follow-up, 3–5 days after the quote

I sent a quote to {{name}} on {{date}} for {{job}}. No reply yet.
Write a short, relaxed follow-up text (max 60 words). Ask if they had a chance to look and if they have questions. No discount, no pressure, no "just checking in".

Prompt 6 – Second follow-up with a reason to decide

Second follow-up to {{name}} about the {{job}} quote from {{date}}.
The honest reason to decide now: {{e.g. my diary for November is filling up / material price valid until 30 Nov}}.
Write a polite email (max 90 words) that mentions this reason once, offers to adjust the scope if budget is the issue, and makes it easy to say no. Subject line included.

Prompt 7 – Polite close-out ("Shall I close this file?")

Write a final, friendly message to {{name}} about the {{job}} quote. Say I'll assume they've gone another way and will close the file on {{date}}, and that they're welcome to contact me any time. Max 50 words. No guilt-tripping.

Prompt 8 – Customer says "too expensive"

Customer {{name}} says my quote for {{job}} at {{price}} is too expensive. They mentioned: {{anything they said, e.g. "got a cheaper quote"}}.
Give me: 1) a calm reply (max 100 words) that explains what's included in my price without attacking competitors, 2) two honest ways to reduce the price by reducing scope (based only on these line items: {{line items}}). Do not offer a discount unless I write "discount allowed: {{amount}}".

C. Reviews & reputation

Prompt 9 – Ask for a Google review right after the job

I just finished {{job}} for {{name}}. They seemed happy because {{e.g. job done in one day, they said thanks for tidying up}}.
Write a short text (max 50 words) thanking them and asking for a Google review. Include this link: {{your review link}}. Mention one specific thing about the job so it doesn't read like a template. No incentives, no "5 stars please".

Prompt 10 – Reply to a good review

Here is a review a customer left: "{{paste review}}"

Write a public reply (max 50 words) that thanks them by first name, mentions the job they described, and sounds like a person, not a company. Don't repeat my business name more than once.

Prompt 11 – Reply to a bad review (calm, public)

Here is a negative review: "{{paste review}}"

What actually happened, from my side: {{facts}}

Write a calm public reply (max 100 words) that: thanks them for the feedback, states the facts briefly without blaming, offers to sort it out offline at {{phone/email}}. No sarcasm, no private details, no admission of things that didn't happen.

Then, separately, list anything in my reply that could make the situation worse, so I can check.

Prompt 12 – Before/after post for my Google profile

I finished {{job}} in {{area}}. Before: {{what it looked like}}. After: {{what changed}}.

Write a short Google Business Profile update (max 80 words) that describes the job in plain words and ends with one line on how to book. No customer names, no exact address, no made-up numbers.

D. Getting paid

Prompt 13 – Friendly payment reminder (a few days overdue)

Invoice {{invoice no.}} for {{job}} over {{amount}} was due on {{date}}. Customer: {{name}}.

Write a friendly reminder (max 60 words) that assumes it's an oversight, repeats amount, due date and how to pay: {{payment details or "see invoice"}}.

Prompt 14 – Firm second reminder

Second reminder for invoice {{invoice no.}} ({{amount}}, due {{date}}, first reminder sent {{date}}).

Write a firm, polite email (max 100 words) with subject line. State the new payment deadline: {{date}}. Mention that I will {{next step I really intend, e.g. add the late fee stated in my terms / pass it to a collection service}} only if it's true. No threats beyond what I listed.

Note to me at the end: remind me to check local rules on late fees and collection before sending.

Prompt 15 – Payment plan offer

Customer {{name}} can't pay {{amount}} at once for {{job}}. I'm willing to accept {{number}} instalments of {{amount each}} on {{dates}}.

Write a short message offering this plan, asking them to confirm in writing, and stating that the plan ends if a payment is missed by more than {{days}} days.

Then write a simple 5-line written agreement I can send for them to reply "I agree" to.

Prompt 16 – Deposit request before ordering materials

For the {{job}} for {{name}} (total {{amount}}), I need a deposit of {{deposit amount}} before I order materials worth about {{material cost}}.

Write a short, matter-of-fact message explaining why (materials are ordered specially), the amount, how to pay ({{payment details or "see invoice"}}), and that work is booked once the deposit is in.

Quick checklist before sending anything the AI wrote

- ☐ Prices, dates and invoice numbers match my own records
- ☐ No promise I can't keep (start date, guarantee, "no mess")
- ☐ Customer's name spelled right
- ☐ No private data that shouldn't be in a message
- ☐ It sounds like me – if not, ask: "Shorter, plainer, more like me."