Trial and quote tracker

FE2

fe2.biz/essentials/#trial-and-quote-tracker

One line per trial, free pass or quote. Each Monday, call the keen ones ending within 7 days. Follow up checkout drop-outs within a day.

Our definition of "keen"

For example: visited twice or more, clicked an email, asked a question or replied to you.

Our extension rule (agreed with finance)

For example: one extension only, [X] days, for keen people. Who can say yes: [one named person].

Name	Phone / email	Start	Ends	Reached checkout? (Y/N)	Keen? (Y/N)	Reminders sent (3-day, 1-day)	Followed up on	Extended to	Outcome (joined / lost)	What they said

Trial and quote tracker: weekly count

Each Monday, fill in last week's numbers. It takes about 10 minutes. Look at the trend, not one week.

Week starting	Trials or quotes that ended	Became customers	Didn't join	Main reason heard
Starting point				

What people told us

Tally each answer from emails and calls. After a few weeks, the biggest one is your main objection.

Answer	Tally	Total
Price		
Questions		
Later		
Other		

If "price" is the biggest, ask finance to compare your prices with two or three similar businesses nearby before changing anything.

Our goal

Didn't join each week: starting point _____ → goal by day 90 _____