GRETNA JUNCTION
CROWNTHRIVE, LLC / DIGITAL COLLECTION

CREATORS & SMALL BUSINESS

The Local Business Follow-Up Kit

Keep customer requests clear and follow through on what you promised.

Pexels · photographer at source / Pexels License / cropped for cover

FREE PLANNING PACK
LICENSED CONTEXT PHOTOGRAPH / VISUAL EDITION 2026-10-30

JUNCTION BUSINESS TOOLS

The Local Business Follow-Up Kit

Keep customer requests clear and follow through on what you promised.

Create a short, repeatable process for responding to requested inquiries and maintaining accurate public business information. No leads, contact lists or automated messages are included.

START HERE

1. Write the service you actually offer and its limits.
2. Record a customer request using a minimal reference.
3. Assign the next agreed action and response date.
4. Close the record with the actual outcome.

Time to begin: 25 minutes to set up; review open requests daily when operating.

Free edition 1.0.0 | October 23, 2026

Included: six planning sections, four printable worksheet sets, eight editable CSV files, an offline HTML workbook, license and file manifest.

Print this PDF to write on the sheets. It has no fillable fields. Edit the CSVs in your own spreadsheet app; they contain no formulas. Keep completed copies privately.

THE PRACTICAL GUIDE

1. Make the offer understandable

Describe what the business provides, whom it serves and the limits of the offer. Keep price, availability and delivery conditions consistent across the places you publish them. Mark a detail that needs checking rather than filling the gap with a marketing claim.

Use the listing audit to compare your current website, directory entry and other public profiles. Record the link, check date and correction needed. This worksheet does not claim a listing, purchase advertising or verify a business's eligibility for a platform.

2. Capture the request with less private data

Give each inquiry a local reference such as Q-001. Record the requested service, preferred contact route and next action. Keep the customer's actual contact information in your appropriately protected business system rather than duplicating it in a shared worksheet.

Use the kit for people who have asked for a response or otherwise agreed to the relevant contact. Do not turn it into a purchased contact list or a tool for unsolicited bulk messages. A service inquiry and permission for ongoing promotion are separate matters.

THE PRACTICAL GUIDE

3. Follow up on the agreed question

Before replying, check what the customer asked and what you promised. State the current answer, any unresolved condition and the next useful step. For example: 'I have the measurements you sent. May I confirm the installation date before I finalize the written quote?'

Keep the message specific to the request. If the customer declines or asks you to stop, record that and respect it. The kit supplies planning prompts, not an automated campaign or assurance that a particular message meets every legal requirement.

4. Keep a quote distinct from an order

Record the quote reference, version, scope and date sent. Use the actual written terms for price, expiry and acceptance. Do not mark a job confirmed because someone opened a message or expressed interest.

When the customer accepts, record the actual agreement in the business's normal system. Keep payment-card information out of these files. This organizer does not collect payments, issue contracts or determine whether money has settled.

THE PRACTICAL GUIDE

5. Make the handoff clear

Before work begins, identify the responsible person, the agreed deliverable and any customer input still needed. Write a completion check that a colleague can understand. Note access or timing questions without exposing private details to people who do not need them.

After delivery, record what was actually completed and any agreed next step. Ask for feedback without promising favorable coverage, rewards or results that are not part of the offer. A completed checklist is an internal record, not an independent endorsement of the work.

6. Review the process using real counts

Count new requests, written quotes, accepted orders and completed jobs separately. A request is not revenue. Keep the original time period and note missing information so that a small sample does not become a broad claim about demand.

Choose one improvement: a clearer listing, faster response to requested inquiries or fewer unresolved handoffs. Gretna Junction's directory and advertising desk are optional discovery routes. CrownThrive's connected business services have their own scope and terms; this free pack does not enroll you in them.

WORKSHEET 1 OF 4

Requested inquiry and next-action log

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Inquiry reference	Q-001 (fictional)
Requested service	Customer asked about a repair
Agreed contact / limit	Reply to this inquiry only
Next action / due	Confirm scope; next business day
Actual outcome	Awaiting scope details

YOUR PRIVATE WORKING COPY

Inquiry reference	Requested service	Agreed contact / limit	Next action / due	Actual outcome

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

WORKSHEET 2 OF 4

Quote status and follow-up plan

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Quote reference / version	Q-001-v1 (fictional)
Defined scope	Scope still being confirmed
Sent / actual expiry	Not sent; no expiry set
Agreed next contact	Respond after requested details arrive
Acceptance evidence	None; not an order

YOUR PRIVATE WORKING COPY

Quote reference / version	Defined scope	Sent / actual expiry	Agreed next contact	Acceptance evidence

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

WORKSHEET 3 OF 4

Public business listing check

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Public listing link	Your business profile (fictional)
Checked date	Enter actual check date
Hours / offer / contact check	Compare with current operating details
Correction needed	Confirm holiday hours
Actually updated	No

YOUR PRIVATE WORKING COPY

Public listing link	Checked date	Hours / offer / contact check	Correction needed	Actually updated

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

WORKSHEET 4 OF 4

Service delivery and handoff record

Read the fictional example, then use the blank table below. The matching CSV provides more room for typing. Add rows in your own copy as needed.

FICTIONAL EXAMPLE	Replace with your own checked information.
Job reference	Example job (fictional)
Agreed deliverable	Written assessment only
Owner / dependency	Assigned operator; confirm appointment
Completion evidence	Not completed
Customer-agreed next step	Send assessment after visit

YOUR PRIVATE WORKING COPY

Job reference	Agreed deliverable	Owner / dependency	Completion evidence	Customer-agreed next step

Use a minimal reference in shared copies. Keep passwords, identification numbers, payment details and sensitive personal information elsewhere.

KEEP, USE AND REUSE

Your files and use terms

You may keep, print and adapt the toolkit for your household, one business you operate or one small community group you organize. Working copies may be shared within that same project. Keep the publisher credit on an unmodified copy.

You may not resell the toolkit, publicly redistribute the package, sublicense it or present it as your own product. Copyright remains with CrownThrive, LLC. Read the included LICENSE.txt for the full terms.

All examples are fictional. These original planning worksheets do not reserve services, send messages, submit applications, collect payments or certify a result. The pack contains no trackers, account connection or automatic answer storage.

The PDF is a print edition. The HTML is a self-contained reading and printing edition. The CSVs contain headings, blank rows or fictional examples, with no formulas or automatic calculations. Save your completed copies in your own appropriate private storage.

The ZIP includes a README, license and a SHA-256 manifest for its other files. The catalog records the containing ZIP checksum. No account, payment or subscription is required.

Help and corrections

https://gretnajunction.com/help?topic=billing

Contact: contact@crownthrive.com