

THE LEADS YOU ALREADY PAID FOR



J O N S M I T H

HOW TO STOP LOSING JOBS AFTER THE PHONE RINGS, AND
CLOSE MORE OF THE LEADS YOU *ALREADY HAVE*



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The Estimate Nobody *Answered*

The bid is open on your laptop. Again.

You measured the job. Called the supplier. Worked through the labor. Checked the scope so you wouldn't eat a change later. Then you sent the estimate and waited.

Example: four hours of work went into that bid. The customer hasn't answered. You open the email again, as if staring at it might make the phone ring.

You could call. But you called already. Maybe they're busy. Maybe your price scared them. Maybe their cousin owns a truck and has suddenly become a contractor.

So you leave it alone.

Then you open the ad account and wonder whether to spend more.

That's an expensive habit: buying another opportunity because you don't know what happened to the last one.

The stories in this book are illustrative composites.

This book starts there. After the phone rings. After the form arrives. After somebody raises a hand and says they might need your help.

The quiet part of the sales problem

A lost lead rarely announces itself. It sits in a voicemail nobody claimed. It waits in an inbox while the owner is on a roof. It becomes an estimate with no next action. Eventually, somebody says the customer went cold.

Sometimes they did. Sometimes your company went quiet first.

Over 55% of customers expect a reply within an hour. Only 20% of pros respond within that hour (Jobber 2026 Home Service Trends Report). See the [report](#).

■ WHAT CUSTOMERS EXPECT VS. WHAT PROS DO



Source: Jobber 2026 Home Service Trends Report

Bars show the reported figures (55% is reported as "over 55%"). The gap between the first bar and the last bar is where jobs go to the next company.

That gap matters because a customer doesn't see your workload. They see whether anybody answered. You know your crew is finishing a difficult job. They know they still need help.

You don't need more leads to prove you can handle the ones you have. You need to stop leaking them before you decide what to buy next.

That doesn't mean every caller should become a customer. Some jobs fall outside your service area. Some scopes don't fit. Some customers choose another provider even when you do everything well. The goal is a clear answer and a controlled process, not a perfect close rate.

What a controlled week looks like

Picture opening your lead list and seeing who needs a call, who has an estimate, and who already made a decision. Each open job has an owner. Each owner has a next action. Nobody has to search an inbox to remember what was promised.

Your dispatcher can answer a status question without interrupting a technician. Your estimator knows which bid needs clarification. You can leave a jobsite without carrying every sales conversation in your head.

Our team audits profiles, rebuilds sites, and listens to call recordings for home service businesses every week. The useful work often starts with something plain: finding the customer conversation that stopped before anybody made a decision.

The work ahead

Count the Leak gives you an honest baseline from your calls, forms, and estimates. The First Hour Wins puts a person behind every incoming inquiry. One Place for Every Lead turns scattered conversations into a working pipeline.

The Estimate Follow-Up That Doesn't Feel Pushy gives you a call and email cadence with a reason for every contact. Dead Leads Aren't Dead helps you reopen suitable old quotes and stay useful to past customers.

Commit to this: bring a real lead list through the book. Choose a person who will own the process. Put the work on the calendar, including your part. Read a chapter, make the change, then keep going.

An estimate shouldn't need a search party. By the end of this book, yours will have a next step.

01

■ CHAPTER 1

Count the *Leak*

A roofer in Texas was sure the leads had gotten worse. The phone still rang, but the schedule felt thin. His answer was to ask the ad company for better prospects.

Then he sat down with the office manager and opened the records. The call history was in the phone account. Website inquiries were in email. Estimates lived in the quoting software. His own follow-up notes lived mostly in his head.

They found a roof replacement marked pending even though the homeowner had declined. Another homeowner had requested a revision nobody sent. A missed call had been counted as a bad lead without anyone returning it.

There were unsuitable inquiries too. But the records couldn't separate a poor fit from a poor handoff.

The owner had been judging lead quality from the jobs he remembered. The jobs he forgot were sitting right there in the list.

THE LESSON

Count what happened to every opportunity before you decide you need more of them.

Why owners get it wrong

Your memory gives the loud jobs extra space. The unreasonable caller. The complicated estimate. The customer who picked somebody cheaper after asking endless questions. Quiet, unfinished conversations don't stick as well.

Our rule: use the last 90 days as your starting window. It's long enough to expose repeated handling problems without asking you to reconstruct the entire history of the business. If your sales cycle runs longer, keep that limitation beside the results.

RULE

An unfinished lead is an open question. Give it an owner and an action before you judge its quality.

The fix

1 Pull the records.

Our rule: audit the last 90 days. Download your phone account's call history, collect website inquiry emails, and export estimates from your quoting tool. If export isn't available, copy the records into a spreadsheet. Keep the original dates and record references.

2 Build one row per opportunity.

Match repeat calls, forms, and estimate revisions to the same job. Add customer, contact details, service, inquiry date, source, estimate status, outcome, and next action. Keep separate jobs from the same customer on separate rows.

3 Mark outcomes and calculate.

Mark accepted jobs Won, confirmed declines Lost, unanswered attempts No Reply, and other active work Open. Add a reason or evidence beside each status. Divide won opportunities by eligible opportunities in the same inquiry-date group. Show open work separately.

Pull records without turning this into archaeology

Start with the places customers actually reach you. Include the office line, the business number you answer in the truck, website forms, and direct inquiry emails. If a lead source sends inquiries to its own inbox, check that too.

Give every row a reference you can reopen: a call timestamp, an email subject and date, or an estimate identifier. When someone questions a status, you can inspect the record instead of debating whose memory wins.

If a caller left no useful details, record the attempt and the available callback number. Don't invent the service they wanted. Missing information belongs in the audit because it tells you where your intake process needs work.

Count jobs, not noise

A homeowner who calls, submits a form, and asks for a revised estimate is usually one opportunity. Counting all those touches as separate leads makes your close rate look worse and your lead volume look better. Neither helps you run the week.

Keep spam, vendors, job applicants, and duplicate records outside the sales denominator. Record why you excluded them. Keep genuine customer requests visible, including work outside your area, so you can see whether your marketing is attracting jobs you cannot serve.

For your close-rate calculation, use a written definition of an eligible opportunity. A practical definition is a genuine request for a service you offer in an area you serve. Apply it consistently. Don't quietly exclude every customer who declined your price.

OWNER MISTAKE

Changing the denominator can make a bad process look healthy. Write your eligibility rule before you calculate.

AUDIT STATUS RULES

STATUS	EVIDENCE TO RECORD
Won	Customer accepted under your normal booking process
Lost	Customer declined, hired elsewhere, or opportunity was closed with a recorded reason
No Reply	Contact attempts made, no customer answer yet, next action assigned
Open	Conversation or estimate still moving toward a decision

Make the math honest enough to use

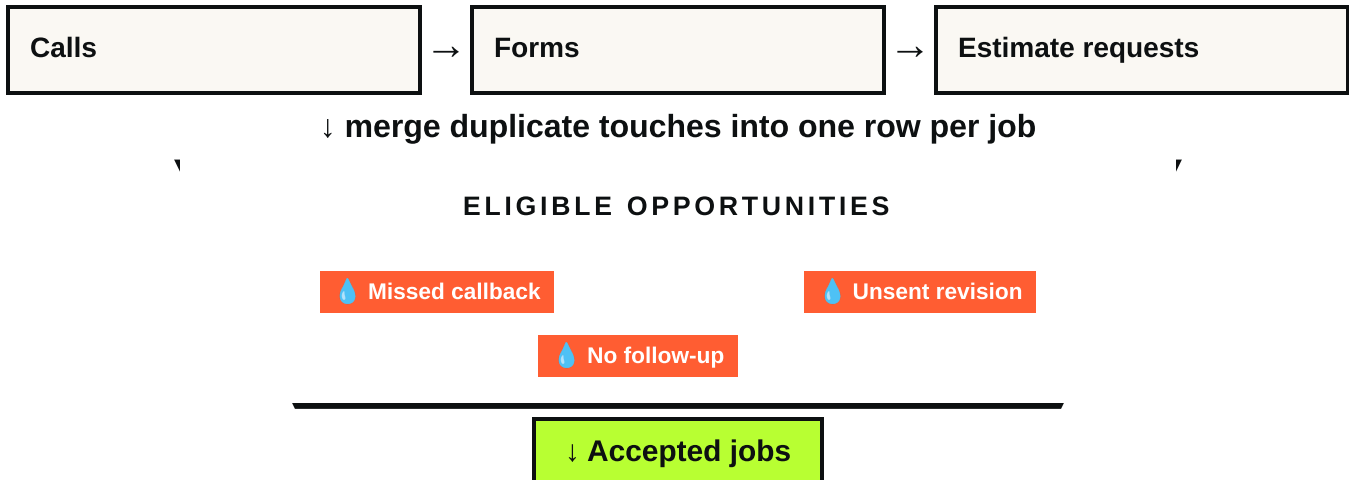
Example: your inquiry-date group contains 40 eligible opportunities. Twelve became won jobs. Your current overall close rate is 12 divided by 40, or 30%. If eight remain open, label the rate provisional. Those jobs may change the result.

A separate estimate acceptance rate answers a different question: what share of sent estimates became accepted jobs? Keep it separate. You can't compare an inquiry-to-job rate this month with an estimate-to-job rate next month and call the difference improvement.

Don't label silence as price resistance. Use Unknown when the reason is unknown. That single word will keep you from discounting jobs based on a story you made up.

BEFORE The owner says leads are bad. The office says callbacks are late. Nobody can trace the missing jobs.	AFTER Each opportunity has a dated record, a status, and evidence. The team can separate unsuitable requests from unfinished work.
THE LEAD-QUALITY ARGUMENT	

THE LEAKY BUCKET



Your leaks are not lead quality. They are handoffs. Count each one in your 90-day audit.

Turn the count into a repair list

Read every unfinished row. Ask what the customer needs next, who can provide it, and when that person will act. A missing callback requires a callback. A missing revision requires a revised scope. Moving the row to a nicer spreadsheet solves neither.

The Texas roofer stopped treating every quiet prospect as a bad prospect. The office manager claimed the callback list. He finished the revision. They closed records where customers had already decided and kept the remaining opportunities visible.

The audit didn't promise more roofs. It gave them a way to stop confusing forgotten work with weak demand.

QUICK WIN Start with a record you can reopen. A plain spreadsheet with evidence beats a polished report full of guesses.

You can't fix a lead leak you keep calling bad luck.

- ☐ Choose the inquiry-date window for your audit.
- ☐ Pull calls, form inquiries, and estimates from that window.
- ☐ Merge repeat contacts about the same job.
- ☐ Write your eligible-opportunity definition.
- ☐ Mark Won, Lost, No Reply, or Open with supporting notes.
- ☐ Calculate the close rate and label unresolved work.
- ☐ Assign the next action on every unfinished opportunity.

The First Hour *Wins*

A plumber outside Atlanta had a perfectly reasonable explanation for every delayed reply. He was under a sink. His helper was collecting parts. The person who usually answered the office phone had left for an appointment.

A homeowner filled out the website form while that was happening. The website displayed a thank-you message. The notification went to the owner's inbox. Nobody called.

When he finally checked, he sent a friendly email offering to help. The homeowner replied that the repair was already arranged.

He blamed the timing. But the timing wasn't unusual. His crew worked in homes all day. The office needed breaks. His inbox wasn't going to become a reliable dispatcher through positive thinking.

What bothered him most was that the website had worked. A nearby homeowner had found the company, wanted the service, and provided contact information. Then the business had left the next move to whoever happened to notice.

THE LESSON

A fast reply needs a named owner, a backup, and a clock.

Why owners get it wrong

Owners often treat responsiveness as a personality trait. They tell the team to stay on top of leads. Then they give everyone a full workload and hope someone hears the phone.

A shared inbox doesn't create shared responsibility. It can create shared assumptions. The dispatcher thinks the owner saw it. The owner thinks the estimator called. The customer hears nothing.

An automatic email helps acknowledge a form. It cannot ask a follow-up question, judge the fit, or agree on a visit by itself. Count it as an acknowledgment. Record the first human reply separately.

A quick, careless answer can still lose trust. Your job is to make useful contact promptly and state an honest next step.

RULE

Our rule: acknowledge website inquiries within 60 seconds and return missed calls within 5 minutes during covered hours. Assign coverage before you promise it.

The fix

1 Set the form acknowledgment.

In your form or CRM tool, find the submission notification or automation settings. Trigger an email to the submitted email address after a successful submission. Use the template below. Our setup target: delivery within 60 seconds. Test from an outside email account.

2 Write the missed-call rule.

Assign the callback to the person covering the business line. Our rule: call within 5 minutes during covered hours. Log the attempt and next action. If they don't answer, leave a useful voicemail; send email only when you have their address.

3 Name coverage and backup.

Put an owner and backup beside every period you advertise phone coverage. Send lead alerts to the person on duty. Require the backup to take over when the owner cannot respond. Test the handoff while the crew is out.

Make the automatic reply earn its place

Remove template placeholders your form does not collect. Test an empty optional field too.

The email should confirm receipt, identify your business, and tell the customer what happens next. Use a monitored reply address. An acknowledgment from an inbox nobody reads creates another hole.

Don't claim a visit is booked when someone only submitted a request. Don't promise immediate service unless the business can provide it. If your form accepts inquiries after hours, say when a person will respond. Use your real staffed hours and local time zone in the template.

Subject: We received your {service} request

Hi {first name}, We received your request for {service} in {city}. Our team will call from {business phone} during {staffed hours and time zone}. Requests received after those hours are reviewed when coverage resumes. This email confirms receipt. Your appointment is confirmed only after we speak and agree on a time. You can reply here with a question or call {business phone}. {business name}

Check the inbox and spam folder on the test account. Confirm the office received its own notification and that replying reaches the right person. A successful form confirmation on your website doesn't prove either email arrived.

OWNER MISTAKE

An automatic acknowledgment is not a customer conversation. Keep the human callback task open until someone attempts it.

Give the callback a useful opening

YOU Hi, this is {your name} with {business name}. I'm returning your call. What can we help you with?

CUSTOMER I need someone to look at {problem}.

YOU What address is the work at, and what timing are you hoping for?

YOU Based on what you've told me, the next step is {actual next step}. Does that work for you?

If voicemail answers, leave your name, business, callback number, and reason for calling. Don't imply an appointment exists.

Cover the moments that keep beating you

Our planning rule: reserve 20 minutes to map coverage before turning on new alerts. Write the actual person's name, not Office. Include lunch, supply runs, estimates, and the time when everyone is driving.

If you're the only person, choose realistic staffed windows and an actual backup arrangement where available. Return calls when safely parked. State the coverage you can deliver and inspect missed calls when coverage resumes. Pretending to provide constant coverage makes the process less reliable.

COVERAGE SHEET

SITUATION	OWNER ACTION	BACKUP ACTION
Crew is working	Office owner handles incoming leads	Assigned backup covers an absence
Office owner steps away	Hand off phone and open callback tasks	Accept handoff before coverage changes
Outside staffed hours	State actual return window in voicemail and email	Review outstanding inquiries when coverage resumes

BEFORE

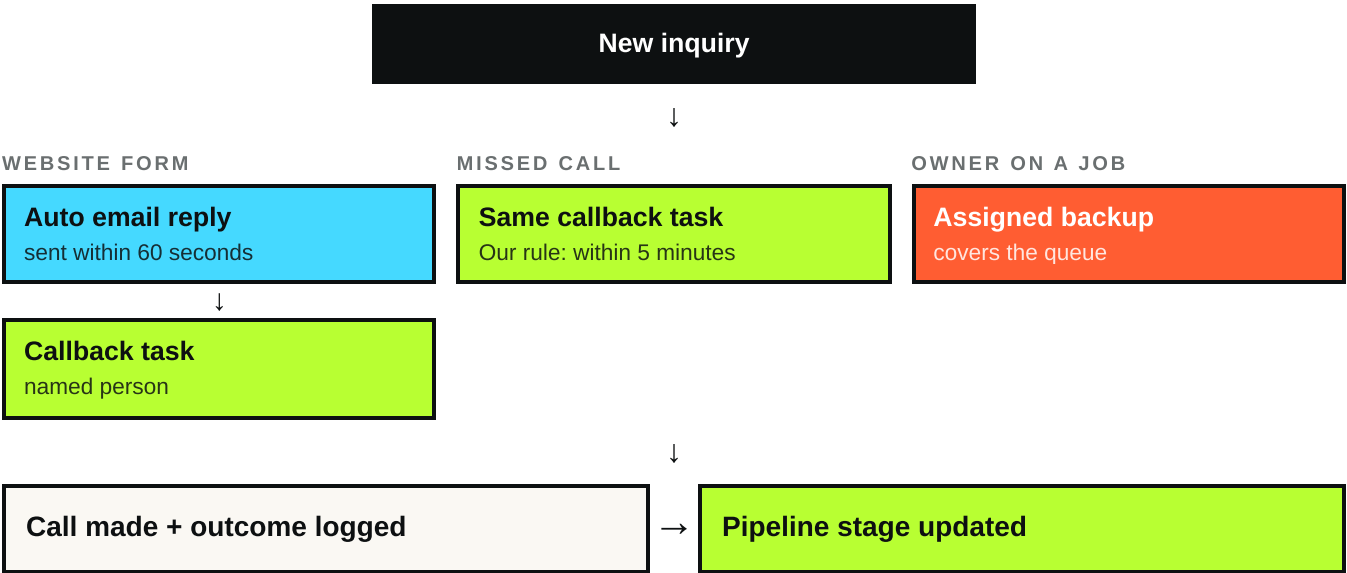
The form sends an email to the owner. The owner finds it after the homeowner books elsewhere.

AFTER

The customer receives an honest acknowledgment. The on-duty person receives the inquiry, owns the call, and records the result.

A FORM WITHOUT A PERSON

SPEED TO LEAD: WHO DOES WHAT IN THE FIRST HOUR



Test the promise under normal pressure

Submit a test inquiry while the owner is on a job. Place a test call when the normal phone owner is away. Ask who received it, who acted, and where the outcome was recorded. If the answer is unclear, repair the handoff before adding another automation.

The Atlanta plumber kept his form. He changed what happened behind it. The office claimed incoming inquiries during staffed hours. His backup accepted coverage when the office stepped away. After-hours messages gave an honest return window.

He still spent his days fixing plumbing. Customers stopped depending on the moment he happened to open his inbox.

QUICK WIN

Test with the owner unavailable. That is the condition your response system needs to survive.

Everybody saw it is not the same as somebody owned it.

✓ DO THIS TODAY

CHECK IT OFF

- ☐ Set and test the website acknowledgment email.
- ☐ Put real staffed hours in the acknowledgment and voicemail.
- ☐ Name the incoming-lead owner and backup.
- ☐ Adopt the covered-hours missed-call callback rule.
- ☐ Test a handoff while the usual owner is unavailable.
- ☐ Record acknowledgment time and human response time separately.

Want us to run this for you? See the last page.

One Place for Every *Lead*

An HVAC owner outside Phoenix was driving between jobs when the office called about an estimate. The customer wanted to know whether the equipment change they discussed was included.

The owner remembered the conversation. He didn't remember whether he'd sent the revision. The office had the original estimate. The technician had a photo. The customer's latest email was in the owner's personal inbox.

He pulled over and started searching. Meanwhile, the office could offer the customer only another promise to check.

Nothing about the job was especially unusual. That was the problem. The company had built a process that required the owner to reconstruct ordinary conversations while everybody waited.

When they finally found the revised scope, it was still a draft. The customer hadn't been ignoring it. The customer hadn't seen it.

The owner didn't need a better memory. He needed somewhere a conversation could live after he stopped thinking about it.

THE LESSON

Every open opportunity needs one record, one owner, and one dated next action.

Why owners get it wrong

A CRM is a customer relationship management system. Owners can buy software and rebuild the same confusion inside it. Too many stages. Optional owners. Notes without dates. A dashboard that looks busy while customers wait.

Keep the pipeline simple enough to inspect during a normal workday. You need to see what arrived, what has a conversation, what has an estimate, and what ended. The software can be plain. The rules cannot be vague.

RULE

No open lead without a next action and due date. Pending is a stage of indecision, not a task.

The fix

1 Create the pipeline.

In your CRM's pipeline or opportunity settings, add New, Contacted, Estimate Sent, Won, and Lost in that order. Name the pipeline Service Leads. In a spreadsheet, create a Status column with those exact choices. Save a test opportunity.

2 Make the essentials required.

Add customer name, available contact details, service, location, inquiry date, source, owner, next action, and due date. Require estimate date and reference at Estimate Sent. Require a reason at Lost. Use Unknown for missing facts, then assign collection as an action.

3 Run the daily review.

Our rule: spend 10 minutes each workday reviewing New leads, overdue actions, and unanswered estimates. Assign or complete each action. Update the record immediately after contact. Close the review only when the next move belongs to someone.

Give the stages a real meaning

New means the inquiry arrived and a human conversation hasn't happened yet. A sent automatic email doesn't move it to Contacted. A voicemail attempt belongs in the activity history, but the lead stays New until you connect.

Contacted means you have a two-way conversation about the request. The next action might be a site visit, a scope clarification, or preparing an estimate. Put that action in its own field so the stage doesn't have to carry every detail.

Estimate Sent means you sent the actual estimate. A draft doesn't qualify. Record the sent date and a reference to the version the customer received. If delivery fails, make fixing delivery the next action.

Won means the customer accepted under your business's normal booking process. Lost means you intentionally closed the opportunity and recorded why. No Reply from the audit becomes an activity condition inside the appropriate open stage, not another pipeline stage.

STAGE	EVIDENCE	NEXT-ACTION EXAMPLE
New	Inquiry received	Return customer's call
Contacted	Two-way conversation recorded	Confirm site visit
Estimate Sent	Estimate sent date and reference	Call about scope question
Won	Acceptance recorded	Hand off to scheduling
Lost	Closure reason recorded	None unless customer requested a later contact

Store enough to hand the job over

A note that says spoke with customer tells your team almost nothing. Write what the customer needs, what was agreed, what remains undecided, and who does what next.

OWNER MISTAKE

A pipeline full of names can still be empty of responsibility. Check owners and actions before admiring the dashboard.

Move the existing work without importing the mess

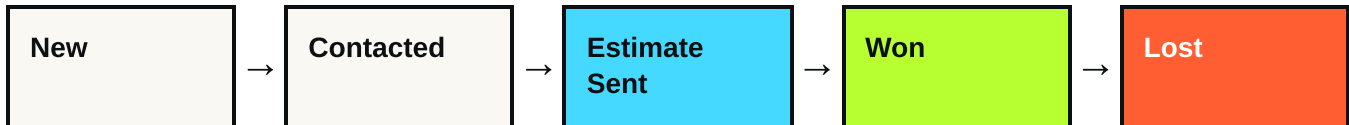
Start with the unfinished opportunities from your audit. Search for an existing contact before creating another. A returning customer may have a new job; keep the contact together while creating a separate opportunity for the new scope.

Before a bulk import, test a sample record. Check how the software maps names, emails, dates, stages, and owners. Our rule: allow 30 minutes for this setup check, then inspect the result before importing the remaining list.

Keep automatic follow-up disabled while testing. You don't want importing an old estimate to send a brand-new acknowledgment or restart a completed conversation. Review each active opportunity's stage and timing before enabling any action that reaches a customer.

BEFORE The office interrupts the owner to find an estimate version, a promise, and a next step.	AFTER The office opens the opportunity, finds the sent estimate reference, and sees who owns the next conversation.
THE OWNER AS SEARCH ENGINE	

THE FIVE-STAGE PIPELINE



Every open card needs: **Owner** **Next action** **Due date**

An unanswered call is a note on the card, not a new stage.

Keep the review short by making it decisive

Open the overdue task view first. Then check new inquiries and estimates with no scheduled action. Ask whether each action was completed, needs reassignment, or needs a new date agreed with the customer. Don't move dates just to clear a red warning.

The Phoenix owner put the revised estimate task on his own record and kept its reference where the office could see it. The next time a customer called, the office could explain the actual status. He still approved technical changes. He stopped being the filing cabinet.

QUICK WIN

Write the note for the teammate who gets the next call. If they can act without interrupting you, the record is doing its job.

Your memory is a terrible place to store someone else's next step.

✓ DO THIS TODAY

CHECK IT OFF

- ☐ Create the approved pipeline stages.
- ☐ Define the evidence needed to change each stage.
- ☐ Add the required fields and task owners.
- ☐ Test an import with customer messages disabled.
- ☐ Add unfinished audit opportunities without duplicating jobs.
- ☐ Put the daily 10-minute review on the calendar.

Want us to run this for you? See the last page.

The Estimate Follow-Up That Doesn't Feel *Pushy*

A cleaning business owner sent a commercial estimate and decided to give the prospect some space. The walkthrough had gone well. The scope looked clear. Calling again felt like begging.

She waited. Then she sent an email asking whether there was any update. No answer. She took that as a no and moved on.

Later, the prospect called about a detail in the scope. They hadn't understood whether supplies were included. They were also coordinating the start date with a building manager. The estimate had been waiting behind those questions.

The owner could answer both. What she couldn't recover was the time spent assuming the customer had rejected her.

She had confused pressure with follow-through. She didn't want to corner somebody into buying. Fair enough. But asking whether the scope made sense wasn't cornering anybody. It was part of helping the customer make a decision.

THE LESSON

Follow up to resolve the next question, not to demand a yes.

Why owners get it wrong

Follow-up feels awkward when your only question is whether they are ready to buy. Repeat that enough and you will feel pushy because you aren't adding anything useful.

Give each contact a purpose. Confirm delivery. Find the unanswered question. Explain the decision. Then close the loop respectfully if the customer stays silent.

Our default cadence is days 1, 3, 7, and 14 after sending the estimate. These are operating rules, not research findings. Customer instructions override the default. If they ask you to call next month, record that date and stop the routine reminders.

RULE

Every follow-up needs a reason beyond checking in. Ask a question you can help resolve.

The fix

1 Set the timeline when you send.

Record the estimate sent date and version. Our rule: schedule follow-up for days 1, 3, 7, and 14 after sending. Tell the customer you'll check that it arrived and answer questions. Use their requested timing when they give it.

2 Call on day 1 and email on day 3.

Confirm receipt by phone, then ask about scope or timing by email if still unanswered. Log each attempt. Use the scripts below and replace every placeholder. Never resend an outdated attachment.

3 Call on day 7 and close the loop on day 14.

Ask what remains undecided, then send the final email if unanswered. Stop the cadence on any reply, acceptance, decline, or request to stop. Record the result and assign any agreed next action.

Day 1: make sure there is something to decide

A customer cannot accept an estimate they haven't received. Ask whether it arrived before assuming the price caused the silence. Check the address if needed. If the message bounced, fix delivery rather than scheduling more reminders to the same bad address.

DAY 1 RECEIPT CALL

SCRIPT

YOU Hi {first name}, it's {your name} with {business name}. Did the estimate for {job} reach you?

CUSTOMER Yes, I have it.

YOU Good. Is there anything in the scope you'd like me to explain?

YOU When would it be useful for us to talk about your decision?

If you leave voicemail, identify the estimate and invite a callback about questions. Record the attempt and keep the next task.

Day 3: ask a question worth answering

Keep the email in the original estimate thread when practical. That puts the scope and your question together. Make replying easy. A customer shouldn't need to schedule a meeting just to tell you their timing changed.

DAY 3 SCOPE QUESTION

EMAIL TEMPLATE

Subject: A question about your {job} estimate

Hi {first name}, Is anything in the scope unclear, or has your timing changed? I'm happy to explain what's included in {specific part of scope} before you decide. Reply here with your question, or call {business phone}. {your name} {business name}

OWNER MISTAKE

Silence is not a request for a discount. Find the question before changing the price.

Day 7: find the actual decision

When a customer answers, let them talk. They may be comparing different scopes. They may need approval. They may be ready but unsure how to accept. Those situations need different help.

DAY 7 DECISION CALL

SCRIPT

YOU Hi {first name}, it's {your name} at {business name}. I'm following up on {job}. What's still undecided on your side?

CUSTOMER We're comparing another estimate.

YOU Understood. Are the scopes covering the same work? I can explain ours so you can compare it clearly.

YOU Would you prefer a next conversation on {agreed date}, or should I leave this with you?

Record the customer's answer. Don't invent a deadline or criticize another provider.

If the customer says your price is higher, clarify the scope you actually quoted. Explain meaningful differences without guessing what a competitor will deliver. Change the estimate only when you intentionally change scope, terms, or an approved business decision. Don't let nervous follow-up rewrite your margin.

Day 14: end the chase honestly

The final email closes the routine. It shouldn't pretend the customer's project is canceled or that the price expires unless your actual estimate says so.

DAY 14 FINAL FOLLOW-UP

EMAIL TEMPLATE

Subject: Should I close your file?

Hi {first name} , I haven't heard back about the estimate for {job} . Should I close your file for now, or is the work still on your list? If I don't hear back, I'll stop the routine follow-ups. You can reply later, and we'll confirm the scope, current pricing, and availability before restarting.

{your name} {business name} {business phone}

Our rule: allow 3 business days after the final email before administratively closing an unanswered opportunity. Record Lost with the reason No response after follow-up, not Price. Preserve the history if they return. Closure is an internal decision about your active list, not proof of what the customer chose.

BEFORE The owner waits, sends a vague update request, then assumes the estimate was rejected.	AFTER Each contact checks delivery, resolves scope or timing, or closes routine follow-up with a clear invitation to reply later.
FOLLOW-UP WITHOUT PRESSURE	

 OUR DEFAULT ESTIMATE FOLLOW-UP CADENCE

DAY 1	DAY 3	DAY 7	DAY 14
Call Did it arrive? Any questions?	Email Scope recap + one useful detail	Call Where are you on the decision?	Email "Should I close your file?"

At ANY step: customer replies → a human answers → next action updated. The cadence stops.

Make the promise survive automation

If you automate emails, use the estimate sent date as the starting point. Stop queued messages when the customer replies or the stage changes to Won or Lost. Test those exits with your own

contact record before enrolling customers. If your tool cannot reliably stop, use dated manual tasks instead.

The cleaning owner began asking what was unclear instead of waiting for a verdict. The building prospect got an answer about supplies and a next conversation tied to the manager's schedule. She could respect the buying process without disappearing from it.

QUICK WIN

An agreed callback date beats a generic reminder. Use the customer's real timeline whenever you have it.

Follow-up feels pushy when you have nothing useful to say.

✓ DO THIS TODAY

CHECK IT OFF

- ☐ Add the default cadence to sent estimates.
- ☐ Use customer-requested dates instead when provided.
- ☐ Save the receipt and decision call scripts.
- ☐ Save the scope and final email templates.
- ☐ Define the unanswered closure reason and waiting period.
- ☐ Test reply and stage-change exits before automating.
- ☐ Record the next action after every customer reply.

Want us to run this for you? See the last page.

Dead Leads Aren't *Dead*

A landscaper in North Carolina had a folder full of old estimates and a habit of ignoring it. Those customers had their chance. He had current work to finish.

During a lighter stretch, the office reviewed the folder. Some customers had declined. Others had asked to wait until a different season. Past customers had also mentioned additional work that never became a new request.

The owner remembered the jobs once he saw the notes. A drainage conversation postponed until after another project. A property cleanup delayed by travel. A maintenance customer who wanted to revisit a neglected area.

These weren't all lost sales waiting to be collected. Some needs were gone. Some people had hired someone else. But the folder contained actual conversations, not a list of strangers.

The business had treated every delay as a permanent ending. Now the owner had a better question: which customers had a real reason to hear from him again?

THE LESSON

Reopen a relevant conversation, then give the customer control over what happens next.

Why owners get it wrong

Old leads become uncomfortable because you don't know what to say. So they sit untouched until somebody suggests blasting the entire database with a discount.

That skips the useful work. A pending quote, a completed job, and a firm no are different relationships. They deserve different messages. The person who asked you to stop emailing shouldn't be on the send list at all.

Treat reactivation as a review, not a rescue fantasy. You are checking whether a previously expressed need still exists. You aren't declaring that every old name represents money the customer owes your business.

Our rule: use a 90-day review point for suitable old quotes and past-customer opportunities. That is a reminder to inspect the record, not automatic permission to email everyone. Customer timing, service relevance, and communication preferences decide who receives a message.

RULE

A reason to contact matters more than the age of the record. Read the history before you send.

The fix

1 Build the review list.

Our rule: review suitable quotes around 90 days after sending, plus past customers with a relevant service need. Filter your CRM by estimate date or last completed job. Exclude current follow-ups, firm declines, unresolved complaints, invalid addresses, and people who opted out.

2 Separate the message.

Create Old Quote and Past Customer groups. Read each record, name the relevant work, and use the matching email below. Our rule: start with a small batch you can personally review and answer that workday. Stop on replies or requests to stop.

3 Schedule useful seasonal check-ins.

Connect the next review to the service, customer's stated timing, and your actual capacity. Set a dated task with a reason. When somebody replies, update the opportunity and agree on a next action instead of leaving the response in email.

Old quotes: ask whether the project survived

Confirm current scope, price, and availability before restarting work.

OLD QUOTE REACTIVATION

EMAIL TEMPLATE

Subject: Is {project} still on your list?

Hi {first name}, We spoke about {specific project} a while back. Is that work still on your list, or has it been taken care of? If it's still relevant, reply with where things stand. We can review the scope and confirm current pricing and availability before you decide. If you'd prefer no more follow-up emails, reply and let me know. {your name} {business name} {business phone}

Keep this separate from the estimate cadence. Don't send a reactivation email to someone currently receiving day-by-day follow-ups. Don't reopen a declined job just because the calendar advanced. If the customer requested later contact, follow that date and mention the request.

When the customer says the work is done, close the opportunity accurately. If they say plans changed, update the scope before sending another estimate. If they want help now, check capacity before offering a visit. A reply is an opening for a conversation, not a booking.

OWNER MISTAKE

An old estimate is not a current offer. Reconfirm scope, pricing, and availability before restarting the job.

Past customers: prove you remember the work

PAST-CUSTOMER SEASONAL CHECK-IN

EMAIL TEMPLATE

Subject: Planning ahead for {relevant service}

Hi {first name}, We helped with {completed work}. As you plan for {relevant season or event}, would it be useful to discuss {specific service}? If so, reply with what you need and your preferred timing. We'll confirm whether a visit makes sense and what availability we have. If you'd prefer no more follow-up emails, reply and let me know. {your name}
{business name} {business phone}

A service reminder should fit the equipment, property, previous work, and the service guidance your business actually follows. Don't invent a maintenance interval to create an email opportunity. Use the job record and your real service recommendations.

Run the send like an owner

Our planning rule: reserve 30 minutes to clean the first list and customize the messages. Then assign someone to monitor replies that workday. If nobody can answer the people who respond, reduce the batch or move the send.

Send from the business identity customers recognize, with a monitored reply address. Honor existing opt-outs before sending and record new requests immediately. Use the sender details and unsubscribe controls your email system provides. Don't re-add excluded contacts during your next import.

BEFORE Old estimates and past customers sit together until somebody wants to send a blanket discount.	AFTER Relevant old quotes and past-customer needs receive different emails, and every reply enters an owned next step.
THE ABANDONED FOLDER	

■ REACTIVATION: REVIEW BEFORE YOU SEND



↓ fails the gate

Do-not-send list unsubscribed, bad fit, unhappy, already booked
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Measure the conversation through to the job

Record who was contacted, which message was used, replies, renewed estimates, and accepted jobs. Keep reactivated opportunities identified so you can trace them without counting the same job twice in your original audit.

The North Carolina landscaper separated real declines from postponed conversations. The office sent relevant messages and handled the replies. Some records closed cleanly. Others returned to an active scope discussion. The folder became a working list instead of a guilt collection.

QUICK WIN Send only what your team can answer. Reactivation creates work as soon as somebody replies.

An old lead deserves a relevant question, not a louder pitch.

- ☐ Review old quotes at your chosen 90-day checkpoint.
- ☐ Separate suitable old quotes from past customers.
- ☐ Remove opt-outs, active follow-ups, and unsuitable records.
- ☐ Customize the matching email with a real service detail.
- ☐ Assign the person who will handle replies.
- ☐ Add agreed next actions to the pipeline.
- ☐ Schedule seasonal reviews only where the service is relevant.

Your Lead Leak *Scorecard*

Score the process you use, not the one you intend to build. Our scoring rule: give yourself 1 point for each Yes and 0 for each No. Total the points out of 15. This is an operating checklist, not an industry benchmark.

Answer Yes only when you can show the record, the assigned person, or a working test. A promise to fix it next week scores zero today.

LEAD LEAK SCORECARD

Count the Leak

- | | |
|--|------|
| ☐ Do you have a deduplicated audit of your chosen inquiry-date window? | 1 pt |
| ☐ Does every opportunity have a supported outcome or an active next action? | 1 pt |
| ☐ Is your close rate based on a written, consistent eligibility rule? | 1 pt |

The First Hour Wins

- | | |
|--|------|
| ☐ Does your form acknowledgment pass an outside-account delivery test? | 1 pt |
| ☐ Is a named person responsible for missed-call callbacks during covered hours? | 1 pt |
| ☐ Does that person have a tested backup handoff? | 1 pt |

One Place for Every Lead

- | | |
|--|------|
| ☐ Are opportunities in the approved pipeline stages? | 1 pt |
| ☐ Does every open opportunity have an owner, next action, and due date? | 1 pt |
| ☐ Does the daily review resolve overdue work instead of hiding it? | 1 pt |

Your score: _____ / 9

LEAD LEAK SCORECARD CONTINUED

Estimate Follow-Up

- ☐ Is every sent estimate assigned the default cadence or customer-requested dates? 1 pt
- ☐ Does every follow-up have a specific purpose? 1 pt
- ☐ Do replies and decisions stop queued routine messages? 1 pt

Old Quotes and Past Customers

- ☐ Are reactivation lists reviewed for relevance and communication preferences? 1 pt
- ☐ Do old quotes and past customers receive different, specific messages? 1 pt
- ☐ Does someone own replies and record accepted work through the normal process? 1 pt

Your score: _____ / 6

Use each No as a work order. Start with any inquiry that has no human owner. Then repair missing next actions, estimate follow-up, and reactivation. Don't wait for a perfect score to return a customer's call.

Our review rule: repeat this scorecard weekly while installing the process. Compare your inquiry-to-job results using the same definition and similar inquiry-date groups. Keep unresolved opportunities visible so newer leads don't make the rate look worse just because they haven't had time to decide.

THIS WEEK

CHECKLIST

- ☐ Audit the chosen 90-day inquiry window and identify unfinished work.
- ☐ Test form acknowledgment, callback ownership, and backup coverage.
- ☐ Put active opportunities in the shared pipeline with dated next actions.
- ☐ Run the daily 10-minute review with the person who owns the queue.
- ☐ Apply the estimate cadence and test its stop conditions.
- ☐ Review suitable old quotes and past customers before sending relevant emails.
- ☐ Record replies, decisions, and scheduling handoffs in the same system.
- ☐ Recheck the scorecard and assign the next repair to a named person.

The bid on your laptop needs an answer, not another week of guessing. Open the record. Check what happened. Make the next useful contact. Then leave a clear trail so the job keeps moving when you

return to the field.

Links in this book

report

<https://www.getjobber.com/home-service-trends-report/>

Links checked Oct 2026; verify before use. Statistics are quoted from the named sources; stories are anonymized composites, and anything marked "example" is illustrative.

■ THE NEXT STEP

Want this done *with you?*

RevOpsFlow is a marketing team for small businesses, based in Atlanta and working with home service companies everywhere. We build and run the systems in this book: fast lead response, CRM pipelines and automation, estimate follow-up, and email that brings old quotes and past customers back. One connected team, one plan, fewer handoffs between the click and the customer.

Where the work in this book lives at RevOpsFlow:

Website Fast, phone-first sites with booking and instant lead alerts. revopsflow.com/services/website	Paid Ads Google and Meta ads with tracking set up first. revopsflow.com/services/paid-ads
The Invisible Newsletter Two emails a week to your list, written in your voice. revopsflow.com/invisible-newsletter	Dedicated Call Reps Lead response, qualification, and appointment setting. revopsflow.com/services
AI Agents (FDE) Starts with an audit. Agents trained on your SOPs. A person approves anything customer-facing. revopsflow.com/services/fde-audit	Growth Plan Website, SEO and AI search, ads, and social run by one team. revopsflow.com/growth-package

Book a free 20-minute Lead Leak Review.

If you'd rather have someone do this with you, book a free 20-minute Lead Leak Review. We'll look at your last 90 days of calls, forms, and estimates and show you where leads are leaking after the phone rings. If we're not a fit, you still leave with the list.

Book my Lead Leak Review at revopsflow.com/contact →

Prefer the phone? Call **(770) 525-8493**. No hard sell.

NEXT IN THE SERIES · BOOK 3

Your Website Is Costing You Jobs

Make your site match your reputation and turn visitors into booked calls.