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Estimate follow-up workbook

Check what your unsold estimates are worth, then set the three follow-up touchpoints that decide whether a customer comes back.

What you need

One month of your own estimate records, and whatever you use to track jobs. A notebook is enough. Nothing here needs new software.

How it works

Type into the fields in a reader that supports forms and save a copy, or print the pages and write. The workbook does not calculate for you and contains no example customer or dollar figures. Every number in it will be yours.

The order to work in

Page 2 lists the estimates that never closed. Page 3 turns that list into one number. Page 4 sets the three touchpoints. Page 5 checks what customers hear during the job. Page 6 holds the English and Spanish scripts. Page 7 is the one change you will actually make. Page 8 lists where the research comes from.

WORKSHEET 1

The estimates that never closed

Pick one month. List every estimate you wrote that did not turn into booked work. Include the ones you assume are dead. Those are the point of the exercise.

MONTH REVIEWED

DATE WRITTEN	CUSTOMER OR JOB	AMOUNT	NEXT CONTACT DATE

If a row has no next contact date, that estimate has no owner and no plan. That is the gap this workbook is for.

WORKSHEET 2

What the backlog holds

Use your own list from page 2. Count first, then add up the amounts. Keep estimates you already know are lost in the count so the number stays honest.

HOW MANY ESTIMATES ARE STILL UNSOLD

WHAT THOSE ESTIMATES ADD UP TO

HOW MANY YOU CONTACTED AGAIN AFTER DAY 5

HOW MANY OF THOSE TURNED INTO WORK

The last two lines are the ones worth watching over time. They tell you what follow-up is doing in your business, using your jobs rather than someone else's survey. One month is a starting point, not a rate you can rely on yet.

A NOTE ON THE MATH

This workbook does not calculate anything for you and does not estimate what you would recover. Matching your records shows what is sitting there. It does not prove that a follow-up call alone would have closed any specific job.

WORKSHEET 3

Three touchpoints, with an owner and a date

A system beats a tool here. Decide who sends each message and when it fires. If nobody owns it, it does not happen.

1. The unsold estimate, day 3 to 5

WHO SENDS IT	WHEN IT FIRES

2. During the job, in real time

WHO SENDS IT	WHEN IT FIRES

3. Three to six months after the job

WHO SENDS IT	WHEN IT FIRES

Touchpoint 3 is the one most owner-operators skip. It is also the one that turns a single job into a repeat customer instead of a one-time transaction.

WORKSHEET 4

What the customer hears during the job

Homeowner research points at communication rather than workmanship as the main source of frustration. Mark what you already do and name who owns the rest.

WHAT THE CUSTOMER GETS	IN PLACE TODAY	WHO OWNS IT
Tech name and photo before arrival		
A text when you are on the way		
A text when the job wraps, with what was done		
A check-in three to six months later		

Nearly 60% of homeowners say they appreciate seeing a technician's name and photo before the visit, and text updates during a job are increasingly the expectation rather than a bonus. [2] None of these four rows needs new software.

REFERENCE

Three scripts to copy: English and Español

Fill in your name and company once, then save these in your phone. They cover the arrival, the moment you hand over the diagnosis, and the point where price comes up.

YOUR NAME

YOUR COMPANY

TOUCHPOINT	ENGLISH	ESPAÑOL
1. ARRIVAL	Hi, this is [Name] from [Company]. I'm on my way to your home and will arrive in about 15 minutes.	Hola, soy [Nombre] de [Empresa]. Estoy en camino a su casa y llegaré en unos 15 minutos.
2. DIAGNOSTIC HANDOFF	I've finished the inspection. I have a few options for the repair. Let me show you photos of what I found.	Terminé la inspección. Tengo algunas opciones para la reparación. Permítame mostrarle las fotos de lo que encontré.
3. PRICE CONVERSATION	We offer payment plans if you'd rather not pay the full amount today. Would you like to see those options?	Ofrecemos planes de pago si prefiere no pagar el monto total hoy. ¿Le gustaría ver esas opciones?

A note on the Spanish: these use the formal *usted* rather than *tú*. That register matters. Using the familiar form with an older homeowner reads the same way as calling a stranger by their first name at the door.

YOUR NEXT STEP

One change. One owner. One review date.

Do not build all three touchpoints at once. Pick the one you are missing entirely, run it for two weeks, then add the next.

THE ONE CHANGE YOU ARE MAKING

WHO OWNS IT

REVIEW DATE

IF YOU ONLY DO ONE THING

Call every estimate you wrote in the last 5 days that has not turned into a job yet. That single habit is tied to the strongest number in the research on page 8.

SOURCES

Where the research comes from

- [1] ServiceTitan, 2025 Residential Services Report (2nd annual), press release, Los Angeles, March 25, 2025. Survey conducted by Thrive Analytics, an independent third-party research firm, polling more than 1,000 residential contractors across HVAC, electrical, plumbing, and roofing. Among contractors doing \$10M+ in revenue, 47% said following up on unsold estimates delivers 11 to 15% of total income. servicetitan.com/press/residential-industry-report-2025
- [2] Housecall Pro, "The New Home Service Standard: How Systems, Not Just Skills, Win the Customer," released December 15, 2025 (PR Newswire, San Diego). Survey of 1,040 U.S. homeowners via SurveyMonkey Audience, fielded October 23, 2025, screened as household decision-makers and balanced to U.S. Census standards. housecallpro.com/wp-content/uploads/2025/12/120425-Customer-Service-Report.pdf
- [3] Two distinct sources, often conflated. Primary research: Frederick Reichheld and W. Earl Sasser, "Zero Defections: Quality Comes to Services," Harvard Business Review 68(5), September to October 1990, pp. 105–111. It found that a 5% reduction in defections generated 85% more profit in a bank branch system, 50% more in an insurance brokerage, and 30% more in an auto-service chain. The wider 25 to 95% range comes from Amy Gallo, "The Value of Keeping the Right Customers," Harvard Business Review, October 29, 2014, summarizing later work by Reichheld at Bain & Company. The 25% and 95% endpoints do not appear in the 1990 article.
- [4] ServiceTitan, 2025 Consumer Trends in the Trades Report, developed with Synchrony and Visa, released September 30, 2025, citing Urban Institute data on Limited English Proficient (LEP) households.
- [5] U.S. Census Bureau, QuickFacts: San Diego County and Imperial County, California, ACS 2020–2024 5-year estimates. census.gov/quickfacts
- [6] U.S. Department of Transportation, Bureau of Transportation Statistics, Border Crossing Data Annual Release: 2025 (BTS 26-20), published February 20, 2026, built on U.S. Customs and Border Protection administrative counts. San Ysidro personal vehicles entering from Mexico: 15,274,409 in 2025, a 20.1% share of the southern-border total. bts.gov/newsroom

Figures on membership-plan retention discussed in the companion article are directional context from vendor-published material rather than independent surveys, and are labeled as such where used. Every percentage tied to a bracketed number above comes from a named, dated, independently fielded survey or federal data source. Survey context across the trades is not a local benchmark and is not a DIGITO customer result.

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