

# The Contractor Follow-Up Kit

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## 1. Five-Stage CRM Pipeline Template

Copy these five stages into your CRM (Jobber, ServiceTitan, Housecall Pro, or any tool with a pipeline view). Every lead should move through these stages. If a lead is stuck in one stage for more than 48 hours, that is your signal to follow up.

Stage	What Happens	Max Time in Stage	Action If Stuck
1. New Lead	Caller/form fill entered into CRM. Auto-text sent within 5 min.	4 hours	Call back immediately. If no answer, send SMS #1 below.
2. Estimate Sent	Tech visits site or phone estimate given. Estimate emailed/texted to customer.	48 hours	Send SMS #2 below (estimate follow-up).
3. Estimate Approved	Customer says yes. Job not yet scheduled.	24 hours	Call to schedule. Don't wait for them to call you.
4. Job Scheduled	Appointment confirmed. Send confirmation SMS 3 days before.	3 days	Send reminder 24hr before. Confirm day-of.
5. Job Complete	Work done. Invoice sent. Send review request SMS.	7 days	Send SMS #4 within 2 hours. Paid after 7 days, send follow-up invoice + call.

**Key rule:** No lead should sit in any stage for longer than the max time listed above. If it does, you are losing money. Set up CRM alerts or reminders for each threshold.

## 2. Five SMS Follow-Up Scripts

Copy and paste these into your CRM's SMS templates or your phone. Replace [Company], [Name], and [Tech] with your info. Keep messages under 160 characters when possible for best delivery rates.

### Script #1: Post-Estimate Follow-Up (send same day)

*"Hi [Name], this is [Tech] from [Company]. Thanks for having us out today. Your estimate is in your inbox. Any questions at all, just reply here or call us. We'd love to help."*

### Script #2: Estimate Reminder (send 3 days after, no response)

*"Hi [Name], just checking in on the estimate we sent over. No pressure at all. If anything changed or you have questions, we're here. We do have openings this week if you'd like to get it scheduled."*

### Script #3: Appointment Confirmation (send day before)

*"Hi [Name], just confirming your appointment with [Company] tomorrow at [Time]. Our tech [Tech] will be there. Reply YES to confirm or call us at [Phone] to reschedule."*

### Script #4: Post-Job Review Request (send within 2 hours of completion)

*"Hi [Name], thanks for choosing [Company]! If [Tech] did a great job today, would you mind leaving us a quick Google review? It really helps. [Google Review Link] Thank you!"*

### Script #5: Seasonal Maintenance Reminder (send every 6 months)

*"Hi [Name], it's been about 6 months since we last serviced your system. Regular maintenance prevents breakdowns and keeps your warranty valid. Want us to schedule a tune-up? Reply YES and we'll find a time that works."*

**Pro tip:** Script #4 (review request) has the highest ROI of any text you will ever send. A 5-star Google review is worth \$500-\$2,000 in future revenue. Send it within 2 hours while the customer is still happy. After 24 hours, response rates drop by 60%.

### 3. Missed Call Recovery Checklist

The average HVAC company misses 20-30% of inbound calls. At \$500+ per job, that is \$5,000 to \$15,000 per month walking out the door. This checklist stops the bleeding.

#	Action	Timeframe	How
1	Return call within 5 minutes	Within 5 min of missed call	Set a CRM alert or use a missed-call auto-text. The #1 factor in winning the job is s
2	Send a text if no answer on call	Immediately after failed call	Hi [Name], this is [Tech] from [Company] returning your call. I'm available today ur
3	Leave a voicemail with a specific offer	15-30 min after failed call	"Hi [Name], this is [Tech] from [Company] returning your call. I'm available today ur
4	Try again 2 hours later	2 hours after first attempt	One more call. If no answer, send a second text: "Just tried you again. We have op
5	End-of-day missed call audit	Every day at 5pm	Pull your missed call log. Any call not returned gets one final attempt tomorrow mor
6	Weekly missed call report	Every Monday morning	Count: total missed calls, callbacks made within 5 min, callbacks that converted to,

**Want to stop missing calls entirely?** An AI voice agent answers every call 24/7, books appointments in real time, and costs less than a traditional answering service. Read our guide: [Best HVAC Answering Service \(2026\)](https://hvacsoftwarehub.com/hvac/answering-service/best-hvac-answering-service) at [hvacsoftwarehub.com/hvac/answering-service/best-hvac-answering-service](https://hvacsoftwarehub.com/hvac/answering-service/best-hvac-answering-service)

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