GUIDE

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ESTIMATE FOLLOW-UP THAT CLOSES: THE 24–72–7–14 PLAY (TEXTS, ONE CALL, ONE DEADLINE) GUIDE

A plain-English, shop-ready guide for home service owner-operators to install the 24–72–7–14 estimate follow-up cadence — short texts, one clean call, and a real deadline — with CRM setup steps, compliant templates, and a 90-minute rollout plan.

FROM EPISODE

ESTIMATE FOLLOW-UP THAT CLOSES: THE 24–72–7–14 PLAY (TEXTS, ONE CALL, ONE DEADLINE)

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Treat follow-up like operations, not ad-hoc sales. This guide turns the 24–72–7–14 cadence into a simple, shop-ready system: short texts, one clean call, a firm deadline, and CRM tasks so every estimate gets a decision in two weeks.

THE PLAY AT A GLANCE: 24-72-7-14

Four touches across 14 days. Text first for speed, one phone call to humanize, then a clear deadline. If they go quiet after Day 14, close the file and move on.

- Immediate (at send): Delivery confirmation text + offer to text the estimate link.
- 24 hours: Friction check — “Anything you want me to clarify?”
- 72 hours: Scheduling nudge with two time options.
- Day 7: One clean phone call (voicemail if no answer) + paired text with link.
- Day 14: Close-file notice with a real deadline.

Rules of the road:

- Keep messages short, plain, and useful (clarify, schedule, or decide).
- Always include opt-out language in marketing-adjacent texts: “Reply STOP to opt out.”
- Schedule by the recipient’s local time, not yours. Avoid Sundays.
- For big-ticket replacements (> $5k), use text to set a brief call instead of pushing for a yes over SMS.

READY-TO-SEND TEMPLATES (TEXTS + ONE CALL)

Copy, paste, and personalize. Keep the tone matter-of-fact — you're running a process, not begging for the job.

1. Delivery confirmation (send immediately)
   "Hi [First Name], it's [Your Name] from [Shop]. Just sent your estimate for [Service] to [Email]. Want me to text you the link? Reply STOP to opt out."

2. 24-hour friction check
   "Quick check on your estimate for [Service] at [Address]. Anything you want me to clarify? Two minutes to answer common questions if helpful. Reply STOP to opt out."

3. 72-hour scheduling nudge (use choice framing)
   "We can get you on the board for [Service]. What works: [Tue 8–11] or [Thu 1–4]? If neither, text a time that's better. Reply STOP to opt out."

4. Day-7 call — voicemail + paired text
   Voicemail: "Hey [First Name], it's [Your Name] at [Shop]. Sent your estimate for [Service]. I'll text you the link in case text is easier. Call or text back with questions."
   Paired text: "Here's the estimate link: [Short URL]. Happy to hold a spot if you want to move forward. Reply STOP to opt out."

5. Optional final check-in (Day 7–10, if you run five touches)
   "Want us to hold a slot for [Service] next week, or should we circle back later in the season? A simple yes or no is perfect. Reply STOP to opt out."

6. Day-14 close-file notice (use a real date)
   "Last check on your estimate for [Service]. We'll hold pricing through [Friday, MM/DD]. If we don't hear back by then, we'll close the file. Reply if you want it saved or have a quick question. Reply STOP to opt out."

Pro tip: Save these as canned replies with variables ([First Name], [Service], [Address], [Short URL]) so CSRs can fire them in seconds.

CRM QUICK-STARTS (JOBBER, HOUSECALL PRO, SERVICETITAN)

Pick your platform and make the cadence run itself. The goal: first two touches automated, two dated tasks per estimate, and one saved view so nothing slips.

Jobber (quotes)

- Automations > Quote follow-ups: create two reminders
    - Reminder #1: 24h after quote sent — use “Friction check” template
    - Reminder #2: 72h after quote sent — use “Scheduling nudge” template
- Tasks: on quote creation, add two due dates
    - Day-7: “One clean call + link text”
    - Day-14: “Close-file text”
- Saved view: “Open quotes — no next touch” (filter: awaiting response AND no task due in next 7 days)
- Fields/Tags: add tag “Unsold-Followup” to track opt-outs and reporting

Housecall Pro (estimates)

- Settings > Messages: set default SMS/email with variables ([customer_first_name], [service_address], [estimate_link])
- Campaigns: build “Estimate Sent” flow
    - Day 1 (immediate): delivery confirmation SMS
    - Day 2 (24h): friction check SMS
    - Day 3 (72h): scheduling nudge SMS

- Tasks/Status: create pipeline step “Day-7 Call Due”; auto-create a task 7 days from estimate date
- Optional: trigger separate “Estimate Declined” campaign with a polite off-ramp message

ServiceTitan (estimates/Marketing Pro or basic automations)

- Automation: “Unsold Estimate Follow-Up”
  - Day 0: SMS delivery confirmation
  - Day 1 (24h): friction check SMS
  - Day 3 (72h): scheduling nudge SMS
  - Day 7: create CSR task to call + send link text
  - Day 14: final close-file SMS
- Tags: apply “Unsold-Followup” at estimate creation; auto-remove when scheduled or closed
- Dashboard: saved report showing
  - % estimates with a next touch scheduled
  - Tasks overdue (Day-7 call, Day-14 close)
  - Decisions within 14 days (Won/Lost/No Response)

Any CRM

- Two automations for 24h and 72h
- Two dated tasks per estimate (Day-7 call, Day-14 close)
- One saved view: “No next touch scheduled”
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One convention: add the estimate link to the customer record so it’s one tap for your paired text

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COMPLIANCE GUARDRAILS (WHAT TO HONOR EVERY TIME)

Keep it simple and safe. This isn’t legal advice — verify with your counsel and carrier program.

- Quiet hours: 8:00 a.m. to 9:00 p.m. recipient local time for marketing texts/calls. Some states are stricter — schedule by customer timezone.
- Consent: get permission to text. Estimate follow-ups are marketing-adjacent; treat them as such.
- Opt-out: include “Reply STOP to opt out.” Honor normal-language opt-outs (e.g., “please stop texting me”) immediately and record them.
- Service vs. marketing: appointment confirmations and day-of updates are service messages; unsold-estimate nudges are marketing. When in doubt, include opt-out language.
- Weekends: avoid Sunday. If the customer texts you first, you can reply inside quiet hours.
- 10DLC hygiene: use your registered sender, don’t send links that look spammy, and keep messages short and transactional.

VARIATIONS AND EDGE CASES (BY JOB TYPE AND SEASON)

Tune the cadence without breaking it.

- Small tickets (< $500): keep all four touches. People often just need a nudge to schedule.

- Mid tickets ($500–$5k): run the standard sequence. At Day-7, be ready to answer financing/warranty questions fast.
- Big tickets (> $5k, system replacements): swap the 72-hour text for a “set a quick call” text.
    - “This is a bigger investment — can we do a 5-minute call [Tue AM] or [Thu PM] to make sure you have what you need to decide?”
- Emergencies/peak season: shorten the window (24–48–5–10) and make the Day-14 deadline the coming Friday.
- If they reply “later”: tag “Call-Back [Month]” and create a dated task; stop the sequence until that date.
- If they say “no” or “went with someone else”: thank them, close the estimate same day, and note the reason (price, timing, scope). Respect the no.

TASKS, TAGS, AND REPORTING (KEEP IT OPERATIONAL)

What you measure is what moves. Track these weekly in a 10-minute huddle.

- Coverage: % of new estimates that entered the 24–72–7–14 sequence (target: 100%)
- Cadence discipline: % with a future next touch scheduled (target: > 95%)
- Decision speed: median days from estimate to decision (target: ≤ 14)
- Close rate: jobs won / estimates sent (watch the trend after rollout)
- Reply rate by touch: which text earns the most replies (usually 72-hour nudge)
- Opt-out rate: keep it low by staying useful and within quiet hours

Simple pipeline board (rename to your system):

- Estimate Sent → 24h Sent → 72h Sent → Day-7 Call Due → Waiting on Customer → Scheduled/Won → Closed (No / No Response)

One rule: no card lives in “Estimate Sent” without a dated next touch.

ROLLOUT PLAN: 90 MINUTES TO GO LIVE

You don’t need a committee. Block 90 minutes and ship.

- Minute 0–15: Paste the six templates into your CRM (save as canned replies with variables).
- Minute 15–40: Set two automations (24h, 72h). Send test messages to your phone.
- Minute 40–60: Create two default tasks per estimate (Day-7 call, Day-14 close). Build a saved view: “No next touch.”
- Minute 60–75: Compliance pass — add “Reply STOP to opt out,” set quiet-hour windows, and remove Sunday sends.
- Minute 75–90: Clean the pipeline.
    - Archive everything older than 30 days.
    - For 8–30 days old: send one final touch — “Circling back on your estimate from last month. Still interested, or should we close this out?”
    - Starting tomorrow: every new estimate enters 24–72–7–14. No exceptions.

Owner’s weekly question: Do we have a due date on every open estimate right now?

CLOSEFILE POLICY AND REACTIVATION

Make the deadline real — and helpful.

- Language to use: “We’ll hold pricing through [Friday, MM/DD]. If we don’t hear back by then, we’ll close the file.”
- If they reply after Day 14: write a new estimate (pricing/availability may have changed) and restart the sequence.
- Re-activation lane: once per season, you can send a non-SMS postcard or email round-up of common projects — but do not re-text opted-out numbers.
- Data hygiene: closing the file removes it from follow-up, improves forecast accuracy, and keeps your team from chasing ghosts.