The 3-Touch Contractor Follow-Up Cadence

Fast-Action Framework for Roofing & Painting Estimates

The Core Principle: Never chase. Provide context, offer a quick walk-through, and close out professionally.

DAY 2 Touch 1 — SMS or Short Email

Goal: Confirm receipt and remove friction.

SMS (RECOMMENDED)

"Hi **[First Name]**, it's **[Your Name]** from **[Company]**. I sent your estimate for **[job, e.g. roof replacement]** yesterday. Did it come through okay? If anything in the scope or numbers is unclear, I'm happy to walk through it in 10 minutes."

DAY 5 Touch 2 — Email

Goal: Highlight one decisive differentiator without discounting.

SUBJECT

One thing worth knowing before you decide on **[Job/Address]**

BODY

"Hi **[First Name]**, I don't want to chase you, so one useful point and then I'll leave it with you: **[Insert 1 real differentiator, e.g. 'we pull all city permits and include a 10-year workmanship warranty']**. That is usually the difference between quotes that look similar on paper. Our next open start date is **[Date]**. If it makes sense, I can hold it for you until **[Date]**.

Best, **[Your Name]**, **[Company]**"

DAY 10 Touch 3 — SMS (The Polite Close-Out)

Goal: Professional closure. Triggers loss aversion and responses.

SMS

"Hi **[First Name]**, I'll close out your **[job]** estimate on my side so I'm not cluttering your inbox. If timing or budget changed, just reply 'later' or 'changes' and I'll follow up when it suits you. Either way, thanks for considering **[Company]**!"

3 Rules for Execution

1. **Hard Stop at Touch 3:** If no response, move the lead to your 30-day reactivation list. Never spam.
2. **Never Discount via Follow-Up:** If price is an issue, adjust the scope, not your profit margin.
3. **Log Dates Immediately:** Every open estimate must have a next-contact date in your calendar or tracker.

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