



The Contractor's Lead Follow-Up Toolkit

5 ready-to-use message templates + the system to make sure no lead falls through the cracks

Every minute you don't respond to a lead, someone else does.

Research shows that responding within 5 minutes makes you **21x more likely** to qualify a lead compared to responding in 30 minutes. Yet the average contractor takes 4–8 hours. This toolkit gives you five ready-to-use message templates and a repeatable system to make sure no lead falls through the cracks.

What's inside:

- 5 message templates (WhatsApp, text, email)
- The 5-Minute Rule checklist
- Lead tracking spreadsheet setup guide
- WhatsApp Business quick-start guide

21x

more likely to qualify a lead when you respond within 5 minutes

Template 1: First Response to a New Inquiry

Use this immediately when a lead comes in. The goal is to acknowledge the inquiry and move toward next steps within 60 seconds.

WhatsApp / Text version:

Hi [Name], thanks for reaching out to [Company]! I saw your inquiry about [service type]. We'd love to help. A few quick questions so I can give you an accurate estimate:

1. *What's the property address?*
2. *Is this urgent or can it wait a week or two?*
3. *Have you gotten any other estimates?*

I can usually get someone out within [timeframe]. Looking forward to helping!

Why it works: Uses their name (personal), references their specific inquiry (relevant), asks qualifying questions (moves forward), and sets a timeline expectation (builds trust).

Template 2: Follow-Up When They Go Quiet

Use this 24–48 hours after your first response if they haven't replied.

WhatsApp / Text version:

Hi [Name], just following up on your [service type] inquiry from [day]. I know things get busy! We still have availability this [week/next week] if you'd like to schedule an estimate. Want me to pencil you in?

Why it works: Non-pushy tone, acknowledges they're busy (empathy), offers a specific timeframe, and ends with a yes/no question (easy to respond to).

Template 3: Quote Follow-Up

Use this 3–5 days after sending an estimate if they haven't responded.

WhatsApp / Text version:

Hi [Name], checking in on the estimate I sent for your [project description]. Do you have any questions about the scope or pricing? I'm happy to walk through it or adjust if anything doesn't look right. We can get started as soon as [timeframe] if you're ready.

Why it works: Opens the door for negotiation, doesn't assume they've decided against you, and offers a concrete start date.

Template 4: After-Hours Auto-Response

Set this as your WhatsApp Business auto-reply for evenings and weekends. 30–40% of leads arrive after 6 PM.

Auto-reply version:

Thanks for reaching out to [Company]! Our office is closed right now, but your message is important to us. We'll respond first thing tomorrow morning by [time].

In the meantime, could you share a few details so we can hit the ground running?

- 1. What type of service do you need?*
- 2. Is this urgent?*
- 3. What's the best time to reach you?*

Pro tip: An AI chatbot can replace this auto-reply entirely, asking all qualifying questions in a natural conversation and creating a pipeline deal automatically.

Template 5: Re-Engagement for Cold Leads (30+ Days)

Use this for leads that went cold 30+ days ago. Their timing wasn't right, but their problem still exists.

WhatsApp / Text version:

Hi [Name], this is [Your name] from [Company]. You reached out about [service] back in [month]. I wanted to check if that's still on your radar. No pressure at all, but if the timing is better now, we have some availability opening up in [timeframe]. Just reply 'YES' and I'll get you on the schedule.

Why it works: Reminds them of their original need, acknowledges timing, creates mild urgency, and makes responding effortless (reply YES).

The 5-Minute Rule Checklist

Print this and tape it next to your desk. Every lead that comes in should trigger this sequence:

Step	Action	Timeframe
1	Acknowledge the inquiry (auto-reply or chatbot)	Under 60 seconds
2	Review lead details (source, service type, urgency)	Within 5 minutes
3	Send personalized first response (Template 1)	Within 5 minutes
4	Create a deal in your pipeline	Within 10 minutes

Step	Action	Timeframe
5	Schedule follow-up reminder if no response	Set for 24 hours
6	Send follow-up (Template 2) if no reply	24–48 hours
7	Send quote follow-up (Template 3) if estimate sent	3–5 days after quote
8	Move to re-engagement queue if still no reply	After 30 days

Quick-Start Lead Tracking Spreadsheet

If you don't have a CRM yet, set up a Google Sheet with these columns:

Column	What to Track	Why It Matters
Date	When the inquiry came in	Measures response speed
Name	Customer name	Personalization
Phone / WhatsApp	Contact method	Follow-up channel
Service Type	What they need	Qualification
Source	Where they found you	Attribution
Urgency	Emergency / Soon / Flexible	Prioritization
Status	New / Contacted / Quoted / Won / Lost	Pipeline tracking
Value	Estimated job value	Revenue forecasting
Next Action	Next step and when	Follow-up system
Lost Reason	Why they didn't hire you	Pattern analysis

WhatsApp Business Quick-Start (5 Minutes)

If you're not on WhatsApp Business yet, here's the fastest path:

Step 1: Download WhatsApp Business (free) from the App Store or Google Play.

Step 2: Register with your business phone number.

Step 3: Complete your business profile: company name, description, address, hours, website, and logo.

Step 4: Set up your auto-reply message using Template 4 above. Go to Business Tools, then Away Message.

Step 5: Add a "Message us on WhatsApp" button to your website. Use [wa.me/\[your-number\]](https://wa.me/[your-number]).

Step 6: Add a WhatsApp QR code to your business cards, truck, and yard signs.

The free app limitation: WhatsApp Business App supports 1 phone + 4 companion devices, basic auto-replies only, and no CRM integration. For AI chatbot qualification, multi-agent access, and pipeline integration, you need the WhatsApp Business API (available through platforms like CustomerFlows).

Want all of this on autopilot?

CustomerFlows captures leads, qualifies them with AI, and tracks them in your pipeline automatically.

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