Contractor Systems Checklist

A practical checklist to plug the leaks in your lead-to-cash process. Work top to bottom and tick off what you already have dialed in.

Lead Capture

- Every call, form, and message lands in one inbox you can see
- Missed calls trigger an automatic text-back within 60 seconds
- After-hours leads get an instant acknowledgement
- Web form leads create a contact automatically (no copy-paste)

Follow-Up

- New leads get a first response in under 5 minutes
- Unanswered estimates get a follow-up sequence (3-5 touches)
- Follow-ups stop automatically when the customer replies or books
- You can see which leads are still waiting on you

Pipeline & Estimates

- Every lead has a clear stage (new, quoted, won, lost)
- Estimate close rate is tracked monthly
- Lost reasons are recorded so you can fix patterns

Jobs & Cash

- Won jobs flow into scheduling without re-entering data
- Invoices send automatically when a job is marked complete
- Overdue invoices get automatic reminders
- Review requests go out after every completed job