The Speed to Lead Playbook

Answer in minutes, follow up until it closes: a step-by-step guide for home service business owners

Most home service businesses do not lose jobs on the work. They lose them in two quiet places. The first is the unanswered call: you are under a sink, on a roof, or in a customer's kitchen, the phone rings in the truck, and by the time you call back that evening the homeowner has already booked someone who picked up. The second is the quiet estimate: you did everything right, visited, measured, wrote a fair price, sent it, and then heard nothing, because nobody followed up while the customer life got busy and a competitor stayed in front of them.

This playbook fixes both leaks, in order: **Score → Respond → Recover → Set Up → Track.** Honest framing up front: this kit is NOT an answering service and it is NOT new software. It is the words and the setup for the tool you already pay for, Jobber, Housecall Pro, or GoHighLevel, plus a plain fallback if you have no CRM at all. Honest timing too: the scripts take one sitting to write and approve once your fact sheet is filled. Putting them into your CRM and testing them is a second sitting. Anyone who tells you follow-up runs itself with no setup and no weekly look is selling you a story. What this promises is narrower and real: every missed call gets a fast text-back, every new lead hears from you in minutes, and every estimate gets followed up on a schedule until it books or closes cleanly.

If you own the Facebook Page Rescue Kit, this is its second half. The Rescue makes the phone ring and the messages come in. This kit makes sure somebody answers in minutes and no estimate dies quietly. It uses the same fact sheet, so most of Step 0 is already done.

Everything in this playbook is customized to YOUR business by one file. Learn Step 0 and the rest runs itself.

New to all this? Start with START-HERE.md instead. It is one page and 7 small steps. The short version of everything below: **you cannot break anything, nothing sends to a real customer until you say go, and you never type into any file, you answer questions in plain English and the AI does the typing.** New words get a plain translation the first time they show up. Automation means "a message that sends itself." A trigger means "the thing that sets it off." A workflow means "the set of steps, in order." CRM means "the program you use to keep track of jobs", and having none is fine.

Step 0: Fill the customization file (about 20 minutes, once)

business_profile.json is the engine of this whole kit. It holds your trade, business name, city and the towns you serve, your services with your real prices, your hours, your phone, your website and quote page, your brand colors and font, **your voice** (how you actually talk, words you use, words you never use), your team facts, your review proof, and two guard lists: the claims about your business that are provably TRUE, and the claims that are BANNED because you cannot prove them.

This kit adds one section to that file: followup. It holds the first name that goes on texts and calls, the callback promise you can actually keep, the start and end of your calling window, which CRM you use, your average job value, how many days your estimates stay valid, and exactly what happens after hours when a call is missed. These fields matter more than any other in this kit, because every promise in every script comes from them. Write the callback promise at the level you can keep on your worst busy day. A promise of a callback within 15 minutes during business hours, kept, beats a promise of two minutes, broken by lunch.

If you ran the Rescue, you only add this section, every other field carries over unchanged. **You never fill this file in by typing into it, not this section, not any section.** The default way is: an AI assistant (the companion SKILL is built for exactly that) fills it for you. The skill's intake rule says that if the profile is incomplete, the AI interviews you with a short fixed list of questions, trade, towns, services and prices, who answers the phone and how fast honestly, the callback promise you can keep, your calling window, your CRM or none, your average job value, how long estimates stay valid, after-hours handling, proof

and banned claims, and your voice, and fills the profile BEFORE it writes a single script. It asks one question at a time, in plain English, and checks each step with you before moving on. The paper path is templates/answer-these-questions.md: answer in your own words, paste it back, and the AI converts it. Either way: no answers, no scripts, because scripts built on guesses are worse than none.

Beside the profile sits business_profile.example.json, the same file filled for a fictional handyman business (Brightpath Home Services, Springfield IL). Its owner is Dan, its promise is a callback within 15 minutes during business hours between 8:00 AM and 6:00 PM, its tool is Jobber, and after hours a missed call gets an instant text-back at any hour with a live call first thing the next business morning, by 9 AM. Read it if any field is unclear, then replace every value with your own verified facts.

Also read your trade's block in templates/trade-adapters.md now, including its Speed note. Emergency trades, plumbing, HVAC, electrical, and roofing storm work, need text-back at any hour and a morning promise. Scheduled trades, cleaning, lawn, handyman, moving, pest, and junk removal, need fast business-hours response and strong estimate follow-up. Your Speed note tells you which pattern your scripts follow.

Step 1: SCORE (one afternoon, three tests, change nothing)

Open templates/speed-scorecard.md and test your business the way a stranger experiences it.

Test one, the missed-call test. Call your own business number from a phone it does not know, and do not answer. Count the rings. Listen to the greeting and write down what it actually promises, most greetings promise nothing, which is the finding. Then wait: does a text arrive, and in how many minutes? Does an email follow? If you were a homeowner with water on the floor, would you wait, or call the next name? For a plumbing shop the honest comparison is ClearLine Plumbing in the examples: a caller with a burst pipe rings several plumbers in a short stretch, and the shop that texts back first usually gets the conversation.

Test two, the form test. Send your own website quote form the way a customer would, at a busy time of day. Time the first text and the first email. A reply that takes until evening is not a reply system; it is a mailbox.

Test three, the last-10-estimates audit. Pull your last 10 written estimates and lay them out in the scorecard's table: date sent, value, every follow-up that actually happened, any reply, and where each one stands. Be exact and be kind to yourself at the same time, most owners find a good estimate, one follow-up at most, then nothing. That pattern is the normal starting point, and it is worth real money: those 10 estimates were already earned, visited, and priced. The work was done. Only the follow-up was missing.

Save the scorecard. You will check it against the weekly log in Step 5, and the audit list becomes your resurrection list in Step 3.

Done when: your scorecard has real times and real counts written in it, not guesses. Nothing in this step changed anything, so there is nothing to undo.

Step 2: RESPOND (the scripts, in one sitting)

Build the five-minute system from templates/missed-call-textback.md and templates/five-minute-response-set.md. Five pieces, all saying the same facts in the same voice:

1. **Missed-call text-back, on.** Two versions: business hours and after hours. Each one names a person, states your callback promise, and asks what the job is, so the customer can start the conversation by text if they prefer. After hours, state your real process plainly, for Brightpath that is a text the moment the call is missed, any hour, and Dan calling first thing the next business morning, by 9 AM.
2. **Form auto-reply, text and email.** The second a quote form is sent, the customer hears back: thanks, the service and town named back to them, who will call, and when. Copy the wording from the same set as the text-back. One promise, everywhere.
3. **Messenger first response.** If you have the Rescue Kit, use its Messenger pack, the instant reply and away message built there, and check that its promise matches this kit's. Do not run two promises. If you do not have it, draft the Messenger reply from the five-minute set here.

4. **Voicemail greeting.** Record a new greeting that carries the callback promise and offers the text option. Thirty seconds of audio is the difference between a caller who waits and a caller who dials the next company.
5. **First-call scripts.** Print or save templates/first-call-scripts.md where calls are answered and returned: the live-answer open, the callback open, the qualifying questions for your trade, how an estimate visit gets booked, and what to say to a price-first caller using only your published prices and your free written estimate where that is your truth.

Read every script out loud before you approve it. If a sentence does not sound like you on a good day, rewrite it until it does. These messages speak as you while your hands are busy.

Done when: you have read all five pieces out loud and every sentence sounds like you. Nothing is switched on yet, so nothing can reach a customer from this step.

Step 3: RECOVER (the estimates you already sent) (about 30 minutes to load, then it runs on schedule)

The sequence, for every new estimate. Load templates/estimate-followup-sequence.md so that each estimate, from the day it goes out, is followed up on Day 1, Day 2, Day 3, Day 7, and Day 14, split across text and email, always inside your calling window. Each touch does a simple job: remind them of the job in their own words, give one reason grounded in service and quality, written estimates, licensed and insured, owner on the job, reviews that are real, state how long the estimate stays valid, and offer one clear next step. Follow-up never leads with price, never invents a discount, and never talks down a competitor. The point is not pressure. The point is that you are the company still there, in a friendly way, when they are ready.

Learn the reply rules now, because they run the whole step. A real reply, they answer a question, offer a date, describe the job further, stops the automation on that channel at once and a person takes the conversation. A booking stops everything. A brush-off, "ok", "thanks", a thumbs-up, "not right now" with nothing behind it, is not contact. Log it as a brush-off and let the sequence

continue politely on schedule. Plenty of jobs book on a later touch from a customer whose first reply was one word.

The requote, for stalled estimates. When someone engaged but cannot decide, use templates/good-better-best-requote.md to rewrite the same job three ways: an essential version, the recommended version you originally quoted, and a complete version with the extras they mentioned. Same facts, same honest pricing, three levels to choose from. One price gives a customer one decision, yes or no. Three levels give them a decision they can actually make.

The resurrection, for the backlog. Take every unbooked estimate from the last 30 to 180 days, starting with your Step 1 audit, and work templates/dead-estimate-resurrection.md as one finite pass: a short human check-in that names the original job, asks if it is still wanted, and leaves the door open either way. Then it stops. Some of these will book; old estimates include moves that got postponed, repairs that got worse, and projects that finally got funded. Whatever does not reply gets marked lost for this job, given a win-back date, and filed, not deleted, not chased forever.

Done when: every new estimate has its follow ups loaded, and every estimate in the 30 to 180 day pile has had its one resurrection pass or is on the list to get it.

Step 4: SET UP (second sitting: pick your CRM guide)

Open the ONE guide that matches the crm_tool field in your profile: templates/setup-jobber.md, templates/setup-housecall-pro.md, templates/setup-gohighlevel.md, or templates/setup-no-crm.md if the answer is none. Do not read all four. Yours is the only setup you need.

In that sitting: paste the approved scripts in exactly as approved (pasting, not retyping, retyping is where promises and prices drift), set each follow-up delay to its sequence day, set the calling window so nothing fires to a customer outside it, and turn on stop-on-reply for every sequence before switching anything live. In the no-CRM path, the same system runs on calendar reminders, saved text and email drafts, and the touch log, slower to run, identical in words and rules.

Then test the whole thing on yourself, and only yourself. Send a missed call from your own phone, submit your own form with your own email, and create a test estimate addressed to you. Time every piece: the text-back, the form reply, the first follow-up. Read each message the way a customer would. An automation is not on because a settings screen says so. It is on when it lands on your phone, on time, worded right. Never run a test on a real customer or a real lead, a "test" text to a homeowner costs more trust than any single fix earns. Every setup guide also has a one line undo: how to pause or turn off each automation, right where you turned it on. Flipping it off is always safe and never deletes your words.

Done when: a test missed call, a test form, and a test estimate all reached YOUR phone and email, on time, worded the way you approved.

Step 5: TRACK (weekly, ten minutes)

Keep templates/touch-log-and-stop-rules.md current for every lead and estimate: when it came in, when you first responded, every touch, every reply marked real contact or brush-off, the booking or the close, and the win-back date where one applies. The stop rules in that file are the conscience of the system, they are what keep follow-up welcome instead of wearing.

Once a week, ten minutes, answer five questions from the log: How many calls were missed, and how many of those got a text-back? What was the middle response time for new leads? How many estimates went out, and how many were followed all the way through the sequence? How many bookings came from follow-up rather than the first conversation? How many resurrections booked? Write the five answers down with the date. That one-page habit is the answer to "is it working?", from records, not feelings.

Done when: the five answers are written down with today's date. That is the whole step, ten minutes.

Fix one thing a week. A delay set wrong, a greeting that no longer matches a changed promise, a sequence someone forgot to load on a busy Friday. Systems like this do not usually break all at once. They drift, one skipped load at a time, and the weekly check is what catches the drift while it is still cheap.

What "working" looks like

Week 1: a missed call from your own phone gets a text back in minutes, your form answers itself with your real promise, and every new estimate leaves with its follow-up already loaded. Month 1: callbacks happen inside the promise even on job days, estimates stop expiring in silence, and the first resurrection bookings come in from work you had already written off. Ongoing: response time and follow-through are numbers in a log you can read in ten minutes, and a slow week is a scheduling fact, not a mystery. This is a response and follow-up system. Judge it like one: by minutes answered, touches completed, and estimates accounted for, every one booked, answered, or closed cleanly with the door left open.