

The Contractor Follow-Up Kit

by HVAC Software Hub | hvacsoftwarehub.com | 2026 Edition

22%

avg. missed call rate
for HVAC companies

\$286K

annual revenue lost
per 50-call/week shop

5 min

callback window
before odds drop 10x

60%

drop in review responses
after 24 hours

Sources: ServiceTitan 2025 Industry Report, Invoca call analytics data (n=4,200 home service companies), BrightLocal consumer review survey 2025. Revenue estimate assumes 50 inbound calls/week, 22% miss rate, \$500 avg. ticket, 50% close rate on recovered calls.

1. Five-Stage CRM Pipeline Template

This is not a generic sales funnel. It is built for residential HVAC, where the gap between "estimate sent" and "estimate approved" is where most revenue dies. Copy these stages into Jobber, ServiceTitan, Housecall Pro, Workiz, or any CRM with a pipeline view.

Stage	What Happens	Max Time	If Stuck: Do This
1. New Lead	Lead enters CRM from call, form, or ad. Auto-text fires within 5 min: "Got your message, we'll call you right back."	4 hours	Call immediately. If no answer, send Script #1 (below). 78% of jobs go to the first responder. After 30 min your odds drop by half.
2. Estimate Sent	Tech visits site or gives phone estimate. Estimate emailed + texted to customer with line-item breakdown.	48 hours	Send Script #2. The #1 reason estimates die: the homeowner got 3 quotes and went with whoever followed up first. Not the cheapest. First.
3. Approved	Customer says yes. Job not yet on the calendar.	24 hours	Call to schedule. Do not wait for them to call you. Every day between approval and scheduling is a day they can change their mind or get a neighbor's recommendation.
4. Scheduled	Appointment confirmed. Confirmation text sent day before (Script #3).	Until job	Send reminder 24hr before + morning of. No-show rate drops from 12% to under 3% with double confirmation. Include tech name so it feels personal.
5. Complete	Work done. Invoice sent. Review request (Script #4) sent within 2 hours.	7 days	If unpaid after 7 days: call + second invoice. For reviews: 2-hour window is critical. After 24 hours, response rates drop 60%. After 72 hours, they forget the tech's name.

WHY THIS MATTERS:

The companies that close 60%+ of estimates are not cheaper. They follow up faster and more consistently. If you implement nothing else from this kit, set a 48-hour alert on Stage 2 (Estimate Sent). That single automation will recover more revenue than any marketing campaign.

2. Five SMS Follow-Up Scripts

Tested across residential HVAC operations in the Southeast. Replace [Company], [Name], [Tech], [Time], [Phone], and [Google Review Link] with your info. Keep messages under 160 characters when possible for single-segment delivery (lower cost, higher deliverability).

Script #1: Post-Estimate Follow-Up

When to send: Send same day, within 2 hours of the visit

"Hi [Name], this is [Tech] from [Company]. Thanks for having us out today. Your estimate is in your inbox. Questions? Reply here or call us. We'd love to help."

Why it works: The phrase "reply here" gets 3x more responses than "call us" alone. Homeowners under 45 prefer texting. Over 45 still appreciate the option.

Script #2: Estimate Reminder

When to send: Send 3 days after estimate, no response

"Hi [Name], checking in on your estimate from [Company]. No pressure. If anything changed or you have questions, we're here. We have openings this week if you'd like to get it scheduled."

Why it works: "We have openings this week" creates urgency without pressure. Conversion rate on day-3 follow-up is 23% higher than day-7.

Script #3: Appointment Confirmation

When to send: Send day before the job

"Hi [Name], confirming your appointment with [Company] tomorrow at [Time]. Your tech [Tech] will be there. Reply YES to confirm or call [Phone] to reschedule."

Why it works: Including the tech's name reduces no-shows by 18%. People cancel on companies. They feel guilty canceling on a person.

Script #4: Post-Job Review Request

When to send: Send within 2 hours of job completion

"Hi [Name], thanks for choosing [Company]! If [Tech] did a great job today, would you mind leaving us a quick Google review? It really helps. [Google Review Link]"

Why it works: This single script generates 3-5 reviews/week for companies that send it consistently. One 5-star review is worth \$500-\$2,000 in future revenue (BrightLocal 2025). The 2-hour window is non-negotiable. After 24 hours, response rate drops 60%.

Script #5: Seasonal Maintenance Reminder

When to send: Send every 6 months (April + October)

"Hi [Name], it has been about 6 months since we last serviced your system. Regular maintenance prevents breakdowns and keeps your warranty valid. Want us to schedule a tune-up? Reply YES and we'll find a time."

Why it works: Maintenance revenue is the most predictable income in HVAC. A \$150 tune-up today prevents a \$3,000 emergency call to your competitor in August. April (pre-cooling) and October (pre-heating) are the two highest-conversion months.

HIGHEST-ROI ACTION IN THIS KIT:

Script #4 (review request). If you only implement one thing, implement this one. Set it up as an automated text in your CRM triggered on job completion. Companies that automate this add 15-20 Google reviews per month. That compounds into higher Google Maps rankings, more inbound calls, and a lower cost per lead.

3. Missed Call Recovery Checklist

This is where the real money is. A missed call is not a minor inconvenience. It is a customer actively trying to give you money and failing. At \$500+ per average HVAC job, 10 missed calls per week = \$260,000/year in lost revenue.

- 1 Return the call within 5 minutes** *Within 5 min of missed call*

Set a CRM alert or missed-call auto-text. Speed is the single biggest predictor of winning the job. InsideSales.com data shows leads contacted within 5 minutes are 21x more likely to convert than leads contacted after 30 minutes. Your competitor is one Google search away.
- 2 Text if no answer on your callback** *Immediately after failed callback*

Send: "Hi, this is [Company]. We missed your call and just tried you back. How can we help? Reply here or call [Phone]." This catches the 40% of people who screened your call because they didn't recognize the number.
- 3 Leave a voicemail with a specific next step** *If voicemail picks up*

Say: "Hi [Name], this is [Tech] from [Company] returning your call. I'm available today until [Time]. You can also text me at this number." A specific time window gets 3x more callbacks than "call us anytime."
- 4 Try again 2 hours later** *2 hours after first attempt*

One more call. If no answer, send a second text: "Just tried you again. We have openings this week if you need service. Text back when you're free." Two attempts is the sweet spot. Three feels pushy.
- 5 Run an end-of-day missed call audit** *Every day at 5:00 PM*

Pull your missed call log from your phone system or CRM. Any call not returned gets one final attempt tomorrow at 9:00 AM. After that, move to your email drip. Takes 10 minutes. Recovers thousands.
- 6 Track it weekly** *Every Monday morning*

Count three numbers: (a) total missed calls, (b) callbacks made within 5 minutes, (c) callbacks that converted to booked jobs. If missed calls exceed 15% of total inbound, you need either more staff or an answering service. If your 5-min callback rate is below 50%, you have a process problem, not a volume problem.

Want to stop missing calls entirely?

An AI voice agent answers every call 24/7/365, books appointments into your calendar in real time, sends the caller a confirmation text, and logs everything in your CRM. No hold times. No voicemail. No per-minute charges during peak season.

Read our full comparison: [Best HVAC Answering Service \(2026\)](https://hvacsoftwarehub.com/hvac/answering-service/best-hvac-answering-service)
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Or call our live AI demo line to hear it yourself: [\(800\) 275-2868](tel:8002752868)