



Speed-to-Lead: 7-Touch Follow-Up for Contractors (Calls • SMS • Email)

Core principles

- Speed beats script. First contact within ≤60s closes more than any wording tweak.
- Multiple channels. Call + SMS + Email.
- Persistence without pestering. 5 touches in 24h; 12 touches in 7 days.
- Always offer the earliest slot. Reduce friction to an on-site booking.

Required setup

- Call tracking with recordings + outcomes (ready-to-buy / quote-only / out-of-area / spam).
- CRM fields: service needed, city, top zips, desired time, notes.
- SMS number tied to brand; opt-out “Reply STOP to end.”
- Templates loaded (below) and assigned to roles (dispatcher/CSR).

The 7-Touch Cadence (sample timing)

Day 0 (within 60s)

1. Call #1 → If no answer, voicemail + SMS #1.
 - Voicemail: “Hi {{Name}}, this is {{Rep}} with {{Company}}. Saw your request for {{service}} in {{city}}. We have an opening today at {{time}} or tomorrow morning. Call/text me at {{phone}}.”
 - SMS #1: “Hi {{Name}}, it’s {{Rep}} at {{Company}}. We can be there today {{time}} or tomorrow AM. Reply 1 for today / 2 for tomorrow.”

Day 0 (+15–30m)

- 2) SMS #2 (if no reply): “Still have a today slot for {{service}} in {{city}}. Want me to hold it?”

Day 0 (+2–4h)

- 3) Call #2 → Voicemail: “Just checking back—do you prefer today or tomorrow AM?”

Day 1 (AM)

- 4) Email #1 (subject: “Quick slot for {{service}} in {{city}}”)

- Short: “We can send a tech {{today/tomorrow}}. Reply with your address and preferred time.”



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Day 2

5) SMS #3: “Still need help with {{service}}? We’re holding one slot for your area.”

Day 4

6) Call #3 → If VM: “We’ll keep one flexible slot this week—text me what works.”

Day 7

7) Email #2 (last touch): “Closing the loop on {{service}} in {{city}}—should we keep a spot open?”

After-hours path

- Auto-reply SMS: “We got your message and we’re on-call. If it’s urgent, reply ‘URGENT’ and we’ll ring you now.”
- Ring on-call within ≤5m if urgent. Otherwise confirm first morning slot.

Disqualification & nurture

- Out of area → tag, add to “future service area” watchlist.
- Price-only shoppers → send price range after qualification; offer free inspection window if applicable.
- No response after 7 touches → move to monthly nurture (tips + seasonal check).

Monitoring & coaching

- Dash weekly: Speed-to-first-call, first-contact rate, bookings, no-shows, call tags.
- Scorecards: random 5 call reviews/week per rep (empathy, verification, close).

Scripts & templates (swap {{variables}})

Phone open (live answer)

“Hi {{Name}}, this is {{Rep}} with {{Company}}. I can get a tech today at {{time}} or tomorrow morning—which works? I’ll just grab your address and the roof/plumbing issue.”



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SMS consented follow-up

“Thanks {{Name}}—you’re set for {{slot}}. We’ll text when we’re on the way. Reply if you need to adjust.”

Email confirmation

Subject: “Confirmed: {{service}} – {{slot}}”

Body: “We’ll arrive within the window. If anything changes, reply to this email or text {{phone}}.”

Tech & automation quick wins

- Wix Form → Zapier: create lead in CRM, send Slack alert, trigger SMS #1.
- Missed call text-back: auto-SMS within 30 seconds.
- Calendar booking link in SMS/Email.
- Review request sent after job completion with photo prompt.
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