

CONTRACTOR SCALER HUB · TOOLKIT

# Build a Sales Process Your Team Can Run

The course's checklists, worksheets and templates in one file: 4 to print or fill in on your phone, and 1 spreadsheet sent with it.

MotionOps

# How to use this toolkit

One file per lesson of **Build a Sales Process Your Team Can Run**, in the order of the course. Each starts with the lesson it belongs to and what to do with it. The tinted rows are the lessons' examples; your numbers go in the blank ones.

Use it lesson by lesson, or go straight to the one you need this week. Nothing here needs an account, and every file says when to check a number with an accountant, an attorney, your licensing board or an insurance agent.

## Contents


1 **Opportunity Qualification Scorecard**
How to Qualify Construction Leads Before the Site Visit

2 **Discovery and Site Visit Checklist**
Discovery and Site Visit Process: Get the Same Information From Every Visit

3 **Estimate Review Checklist**
Construction Estimating Process: Same Number Every Time

4 **Follow-Up Playbook**
Construction Sales Process: A Pipeline Your Team Runs Without You

5 **Lead Source Tracking Spreadsheet**
Spreadsheet · lead-source-tracking-spreadsheet.xlsx

LESSON 1 · HOW TO QUALIFY CONSTRUCTION LEADS BEFORE THE SITE VISIT

# Opportunity Qualification Scorecard

Goes with the lesson on qualifying construction leads. Fill in sections 1 and 4 once and give them to whoever answers the phone. Then fill in a scorecard (section 3) on every new lead, right after the first call and before anyone books a site visit.

## 1. Your fit profile

One page that says what a good job looks like for you right now. Write the size range from your own numbers, not a wish: if your smallest profitable job is $15,000, that's your floor. A full backlog means you can be stricter; a slow month means you might take smaller jobs on purpose.

| Criterion | Good fit | Not a fit |
|---|---|---|
| **Example** Type of work | Bathrooms, kitchens, basements, decks | New construction, roofing, commercial |
| **Example** Size | $15,000 to $120,000 | Under $5,000 (refer out or handle as a service call) |
| **Example** Area | Within 40 minutes of the shop | More than an hour away |
| **Example** Timing | Start in 3 weeks to 6 months | "Next week," or "sometime next year, maybe" |
| **Example** Budget | In the range of what similar jobs cost you | Far below what the work costs |
| **Example** Decision | Everyone who decides can meet you | One spouse "will decide later," or a landlord who isn't involved |
| **Example** Property | Owner-occupied, access is reasonable | Unpermitted work they want hidden, or a property they don't control |
| **Type of work** | | |
| **Size** | | |
| **Area** | | |
| **Timing** | | |
| **Budget** | | |
| **Decision** | | |
| **Property** | | |

PROFILE WRITTEN ON

NEXT REVIEW (MONTHLY)

## The budget range you give on the call

Give the range yourself, from your own past jobs. Some homeowners don't know what work costs and won't say a number first. If they're far below it, you've saved them a wasted visit as well.

| Job type | "Jobs like this have been between ... and ... for us" |
|---|---|
| **Example** Bathroom | $28,000 to $45,000 |
| | |
| | |
| | |
| | |

## 2. Example: three calls on one morning

**Made up to show the method.**

| Criterion | Lead A: primary bath | Lead B: small deck repair | Lead C: kitchen |
|---|---|---|---|
| Type of work | 2 | 1 | 2 |
| Size | 2 | 0 ($3,000) | 2 |
| Area | 2 | 2 | 1 (55 minutes away) |
| Timing | 2 | 2 | 1 ("maybe spring") |
| Budget | 2 | 1 | 1 (lower end of the range) |
| Decision | 2 | 2 | 1 (spouse away until next week) |
| Property | 2 | 2 | 2 |
| **Total** | **14: go** | **10, but a zero: no-go** | **10: go** |

Lead A gets a visit this week. Lead B is a good customer for someone else: refer them to a handyman you trust. Lead C squeaks into "go" with four ones: book the visit for when both decision makers are home, and tell the estimator the budget is tight before they walk in.

## 3. Scorecard: one per lead, right after the call

| LEAD NAME | DATE OF THE CALL | PHONE |
|---|---|---|
| | | |
| **TAKEN BY** | **PROPERTY ADDRESS** | **HOW DID YOU HEAR ABOUT US?** |
| | | |

Ask every question and write what they said. Then score each criterion: **2** clearly a fit, **1** unclear or close to the edge, **0** clearly not a fit.

| Criterion | Ask | A good answer sounds like | What they said | Score |
|---|---|---|---|---|
| Type of work | What would you like done, and what's prompting it now? | A clear project and a reason: "The shower's leaking into the ceiling below" | | |
| Size | From the project they describe and the budget answer | Inside your size range | | |
| Area | Where is the property? | An address inside your area | | |
| Timing | When would you like it finished? | A date or a season inside your window | | |
| Budget | Have you set a budget? Jobs like this usually run between X and Y for us. | "That's about what we expected," or a number inside your range | | |
| Decision | Who else will be part of the decision? | "My wife and I, and we can both be there" | | |
| Property | Do you own the property? | Yes, or a landlord who's involved | | |
| Competition | Are you getting other prices? | Any honest answer; it tells you how to follow up | | No score |
| **Total** | | | | **/ 14** |

## Decide and take the next step (rules are examples)

- [ ] **Go:** no zeros and 10 or more points out of 14. Book the site visit.
- [ ] **Maybe:** no zeros, under 10 points. A short follow-up call or a video call first; book the visit if the gaps close.
- [ ] **No-go:** any zero. Say no politely and refer them on (section 5).

GO: SITE VISIT BOOKED FOR

MAYBE: FOLLOW-UP OR VIDEO CALL ON

NO-GO: REFERRED TO

- [ ] Call notes and score saved on the lead record; go leads handed to the estimator with them

## 4. Who qualifies

| Who | What they do | Name |
|---|---|---|
| **Owner** | Writes the fit profile and the score rules; reviews them monthly | |
| **Office coordinator** | Takes the first call, asks the questions, scores the lead, books the visit or closes the lead | |
| **Estimator** | Gets the "go" leads with the call notes and score, and calls back the "maybes" | |

The call notes go on the lead record, not in someone's notebook, so the estimator arrives already knowing the budget, the timing and who decides.

## 5. Say no well

A no-go lead is still a person who might send you a referral or call again in two years. Be quick, honest and useful.

> CHANGE THE WORDS TO FIT THE JOB
> Thanks for thinking of us. A repair this size isn't something we can schedule well, and I don't want you waiting weeks. Here's a handyman we trust who does this kind of work. If you ever plan a bigger project, call us.

**Businesses we refer out to:** handymen, other trades, contractors who do the work you don't. Some of them will send work back.

| Business | Work they do | Phone |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
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| | | |

## 6. Once a month: check whether your scoring works

| Check | What we found | Rule to change |
|---|---|---|
| **Close rate by score:** do "go" leads with high scores really win more often than the low ones? | | |
| **Visits that went nowhere:** what score did they have? Which criterion was wrong? | | |
| **No-go leads you'd have wanted:** did a rule turn away good work? | | |

If high-scoring leads don't close better, the criteria are measuring the wrong things. **Change one rule at a time.**

## What to review

| What to review | Month: _____ | Month: _____ |
|---|---|---|
| Lead-to-visit rate | | |
| Visit-to-proposal rate | | |
| Close rate by lead score | | |
| Site visits per week that didn't lead to a proposal | | |

LESSON 2 · DISCOVERY AND SITE VISIT PROCESS: GET THE SAME INFORMATION FROM EVERY VISIT

# Discovery and Site Visit Checklist

Goes with the lesson on the discovery and site visit process. One copy per visit: the packet before you go, the questions, what to measure and photograph, the close, and the visit summary that goes to estimating within 24 hours.

## 1. Before the visit: the packet

Whoever books the visit sends the estimator this, so they don't walk in cold.

CUSTOMER

VISIT DATE AND TIME

ADDRESS

ESTIMATOR

- [ ] Call notes and lead score from qualifying
- [ ] Photos the customer sent
- [ ] Address checked on a map
- [ ] Budget range already discussed: $_____ to $_____
- [ ] Who will be there, and who decides
- [ ] Visit confirmed by text the day before
- [ ] Everyone who decides asked to be there

ANYTHING THE CUSTOMER MENTIONED THAT MATTERS: PETS, PARKING, A DEADLINE

## 2. Discovery: ask before you measure

The answers change what you measure and what you propose. Write them in the customer's words: "wants it to feel bigger" is more useful in the proposal than "open concept."

GOAL. WHAT DO YOU WANT THIS TO LOOK AND WORK LIKE WHEN IT'S DONE? (THE SCOPE YOU PRICE, AND THE OPTIONS YOU OFFER)

REASON. WHY NOW? WHAT HAPPENS IF YOU WAIT? (URGENCY, AND WHAT TO LEAD WITH IN THE PROPOSAL)

MUST-HAVES. WHAT HAS TO BE INCLUDED, AND WHAT WOULD BE NICE? (SEPARATES THE BASE SCOPE FROM OPTIONS)

CONCERNS. HAVE YOU DONE WORK LIKE THIS BEFORE? WHAT WENT WELL OR BADLY? (THE WORRIES YOUR PROPOSAL NEEDS TO ANSWER)

BUDGET. IS THE RANGE WE TALKED ABOUT STILL COMFORTABLE? (ONE SCOPE, OR GOOD, BETTER AND BEST OPTIONS)

TIMELINE. IS THERE A DATE THIS HAS TO BE DONE BY? (SCHEDULING, AND WHETHER YOU CAN COMMIT)

DECISION. HOW WILL YOU DECIDE, AND WHO ELSE IS INVOLVED? (WHO THE PROPOSAL HAS TO CONVINCE, AND WHEN TO FOLLOW UP)

## 3. Documentation: measure and photograph once

Keep one checklist per job type you sell most: bathroom, kitchen, deck, panel upgrade. Fill it in on site, so nobody drives back for a measurement and anyone in the office can see what was found. The tinted rows are from a made-up deck replacement.

JOB TYPE

CHECKLIST VERSION OR DATE

| Measurement the estimate needs | Value, with units | Photo |
|---|---|---|
| **Example** Deck size | 16 × 20 ft | |
| **Example** Height off grade | 7 ft, measured | |
| | | |
| | | |
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| | | |

### Photos that must be taken

- [ ] Every wall or side
- [ ] Access
- [ ] Existing conditions up close
- [ ] Electrical panel or water heater, if relevant

| Condition to check: damage, rot, old wiring, slope, soil | What was found | Changes the price? |
|---|---|---|
| **Example** Existing footings | Photographed; two cracked | Yes |
| | | |
| | | |
| | | |
| | | |

## Access and logistics

PARKING

HOW MATERIALS GET IN (EXAMPLE: GATE IS 36 IN, MATERIALS MUST BE CARRIED)

WHERE A DUMPSTER CAN GO

WORKING HOURS

CODE OR PERMIT QUESTIONS TO LOOK UP BEFORE PRICING (EXAMPLE: CUSTOMER WANTS CABLE RAIL; CHECK LOCAL CODE)

## 4. End the visit: the same three things

- [ ] **What happens next:** "You'll have the proposal by Thursday."
- [ ] **How it will be presented:** "I'd like to walk you both through it by phone or in person, about 20 minutes."
- [ ] **A time for that walkthrough,** booked before you leave

PROPOSAL PROMISED BY

WALKTHROUGH BOOKED FOR (DATE, TIME, PHONE OR IN PERSON)

A booked walkthrough is the start of your follow-up. A proposal emailed with no conversation can sit unanswered.

## 5. Visit summary for estimating, within 24 hours

The next estimator, the project manager and the crew read this page when the job is sold, even if the person who visits also prices the job. **Test it: could someone else price this job from this page?**

WRITTEN BY

DATE

CUSTOMER AND JOB

CUSTOMER AND DECISION MAKERS: NAMES, WHO DECIDES, HOW THEY'LL DECIDE

GOAL AND MUST-HAVES, IN THE CUSTOMER'S WORDS

OPTIONS TO PRICE: WHAT'S BASE SCOPE AND WHAT'S OPTIONAL

MEASUREMENTS AND PHOTOS: LINKED OR ATTACHED, FROM THE CHECKLIST

CONDITIONS AND RISKS: ANYTHING THAT COULD CHANGE THE PRICE OR THE SCHEDULE

BUDGET AND TIMELINE CONFIRMED ON SITE

NEXT STEP: PROPOSAL DATE AND BOOKED WALKTHROUGH

## 6. Once a month: keep everyone calibrated

- [ ] **Ride-alongs:** a new estimator goes on a few visits with an experienced one before going alone, then the other way round
- [ ] **Summary review:** the owner or lead estimator reads a few visit summaries from each person and asks, "Could someone else price this job from this page?"
- [ ] **Missed items:** every change order caused by something the visit should have caught goes back into the checklist

## What to review

| What to review | This month | What we changed |
|---|---|---|
| Visits that needed a second trip or a call back for missing information | | |
| Days from visit to proposal | | |
| Change orders caused by something the visit missed | | |

LESSON 3 · CONSTRUCTION ESTIMATING PROCESS: SAME NUMBER EVERY TIME

# Estimate Review Checklist

Goes with the lesson on the construction estimating process. Sections 1 and 2 are the review a second person does before an estimate goes out: five minutes, not a re-estimate. Sections 3 to 5 are the standard the review checks against, set from your own past jobs.

## 1. Which estimates get a review

You don't need to review every one. Tick your rule and fill in the blanks.

- [ ] Every estimate from an estimator in their first three months
- [ ] Every estimate over $_____
- [ ] Any job type we haven't done much of: _____
- [ ] Anything priced under the margin floor

REVIEWER

BACKUP REVIEWER

## 2. The review: one per estimate

CUSTOMER AND JOB

ESTIMATOR

REVIEWER

ESTIMATE AMOUNT

DATE

REASON FOR REVIEW

| Check | Question | OK | Note |
|---|---|---|---|
| **Scope** | Does the scope match the visit summary, including the must-haves? | | |
| **Quantities** | Do the quantities match the measurements and photos? | | |
| **Rates** | Were the standard production rates and waste factors used? If not, is the reason written down? | | |
| **Missing items** | Disposal, protection, permits, access, cleanup? | | |
| **Margin** | At or above the floor? If below, who approved it and why? | | |

| Check | Question | OK | Note |
|---|---|---|---|
| **Exclusions** | Are the standard exclusions and any job-specific ones listed? | | |

## Check the numbers

**Example, made up:** a tub-to-shower conversion with 110 sq ft of straight-lay tile, priced with the standard in section 4 (labor at an assumed $45 an hour).

| Line | Example, with the standard | This estimate |
|---|---|---|
| Tile labor: quantity × production rate × labor cost | 0.45 × 110 sq ft = 50 h, $2,250 | |
| Tile with the waste factor | $1,800 + 12% = $2,016 | |
| Disposal (always included) | $650 | |
| Subcontractors, from current quotes | Plumbing $3,200, electrical $900 | |
| Other materials | $5,400 | |
| Other labor | 48 h, $2,160 | |
| **Total cost** | **$16,576** | |
| Gross margin used | 32% (the floor) | |
| **Price: total cost ÷ (1 - margin)** | $16,576 ÷ 0.68 = $24,376, priced at **$24,400** | |

BELOW THE FLOOR: APPROVED BY

WHY

## Before it's sent

- [ ] Every check above is OK, or the reason is written down
- [ ] Proposal sent
- [ ] The estimate's hours and costs saved, to compare with the actuals later

REVIEWED BY

DATE

## 3. Production rates from your past jobs

A production rate is how long one unit of work takes your crew: hours per square foot of tile, hours per fixture, hours per linear foot of fence. Start with the five or six tasks that drive most of your labor cost.

1. **Pick one task and 6 to 12 recent jobs** where it was done.
2. **Divide the actual hours by the quantity** for each job. You need timesheets that show hours by job and, ideally, by phase.
3. **Take the middle value,** not the best job and not the worst.
4. **Separate jobs that really are different:** patterned vs. straight tile, remodel vs. new construction, occupied homes vs. empty ones.

TASK

UNIT (SQ FT, FIXTURE, LINEAR FT)

KIND OF WORK (E.G. STRAIGHT-LAY, OCCUPIED HOME)

| Job | Quantity | Actual hours | Hours per unit: hours ÷ quantity |
|---|---|---|---|
| **Example** 1 | 96 sq ft | 39 | 0.41 |
| **Example** 2 | 120 sq ft | 53 | 0.44 |
| **Example** 3 | 105 sq ft | 47 | 0.45 |
| **Example** 4 | 88 sq ft | 41 | 0.47 |
| **Example** 5 | 130 sq ft | 68 | 0.52 |
| **Example** 6 (herringbone floor) | 110 sq ft | 68 | 0.62: a different kind of work, its own rate |
| | | | |
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**Middle value:** put the rates in order and take the one in the middle. Example, straight-lay tile, jobs 1 to 5: 0.41, 0.44, **0.45**, 0.47, 0.52. Everyone uses 0.45 hours per sq ft until the next review.

OUR RATE FOR THIS TASK

NEXT REVIEW

## 4. Your estimating standard

One document every estimator uses. **The example values are made up; set yours from your own jobs.** The margin floor comes from your overhead and profit goal.

| Standard | Example | Ours |
|---|---|---|
| **Production rates** | Straight-lay tile 0.45 h/sq ft; patterned tile 0.62 h/sq ft; demo of a full bathroom 16 h | |
| **Waste factors** | Straight-lay tile 12%; patterned tile 20%; framing lumber 10% | |
| **Labor cost** | Burdened hourly cost: $45 | |
| **Adjustments** | Occupied home: +10% labor; second floor with no direct access: +1 hour per day for carrying | |
| **Price list** | Current prices for your common materials, updated monthly | |
| **Margin floor** | Minimum gross margin 32%, from your required margin | |
| **Minimum job** | No job under $8,000 except service calls | |
| **Always included** | Disposal, protection of floors, final clean | |
| **Standard exclusions** | Hidden damage, permit fees over a set amount, work by others | |

## Test it: two estimators, one past job

Have two estimators price the same past job with the standard and compare. Before the standard, the example bathroom was priced $5,240 apart ($27,550 and $22,310). With it, they should land within a few hundred dollars; what's left is judgment about the specific job.

| | Estimator: _____ | Estimator: _____ |
|---|---|---|
| Labor hours | | |
| Materials, with waste | | |
| Subs and other costs | | |
| Total cost | | |
| Margin used | | |
| **Price** | | |

| DIFFERENCE BETWEEN THE TWO PRICES | WHAT CAUSED IT |
|---|---|
| | |

## 5. Every quarter: keep the standard honest

Compare estimated and actual hours on the jobs that closed, by task.

| Task | Standard rate | Estimated hours | Actual hours | Difference | New rate |
|---|---|---|---|---|---|
| | | | | | |
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- [ ] Production rates that are consistently off updated
- [ ] Waste factors that keep running over updated
- [ ] Price list updated
- [ ] Margin floor still matches our overhead
- [ ] Changes shared with every estimator, with the reason

## What to review

| What to review | This quarter |
|---|---|
| The spread between estimators on the same or similar jobs | |
| Estimated vs. actual hours by task | |
| Estimates sent below the margin floor, and why | |

LESSON 4 · CONSTRUCTION SALES PROCESS: A PIPELINE YOUR TEAM RUNS WITHOUT YOU

# Follow-Up Playbook

Goes with the lesson on the construction sales process. Fill in sections 1 to 3 once, with everyone who owns leads or proposals. Then every sent proposal follows section 4, and section 6 is the agenda for the weekly pipeline review.

## 1. Stages, owners and time limits

**Example roles and time limits; set your own.** Two rules hold it together: every open lead and proposal has **exactly one owner,** a person, not "sales" or "the office"; and every lead has **a next step with a date.**

| Stage | Done when | Example owner and time limit | Our owner | Our time limit |
|---|---|---|---|---|
| **1. New lead** | Someone has spoken with the customer | Office coordinator; same working day | | |
| **2. Qualified** | Scored go, maybe or no-go; visit booked or lead closed | Office coordinator; at the first call | | |
| **3. Site visit** | Visit summary written, walkthrough booked | Estimator; visit within 5 working days, summary within 24 hours | | |
| **4. Proposal** | Proposal sent and walked through with the decision makers | Estimator; within 3 working days of the visit | | |
| **5. Follow-up** | Signed, declined or closed as lost | Proposal owner (estimator or salesperson); sequence below, closed 30 days after sending if there's no answer | | |
| **6. Won** | Deposit received, job handed to operations | Office coordinator; within 2 working days of signature | | |
| **7. Lost** | Reason recorded | Proposal owner; same day | | |

## 2. Handoffs: what must be on the lead record

**Qualified → visit** (office → estimator)

- [ ] Call notes
- [ ] Lead score
- [ ] Budget range discussed
- [ ] Who decides
- [ ] Photos the customer sent

**Visit → proposal** (estimator → whoever prices, often the same person)

- [ ] Visit summary: goals and must-haves
- [ ] Risks
- [ ] Measurements and photos

**Proposal → follow-up** (estimator → proposal owner, if different)

- [ ] What was discussed in the walkthrough
- [ ] Decision date
- [ ] Objections

**Won → operations** (sales → office coordinator or project manager)

- [ ] Signed proposal
- [ ] Everything promised to the customer (e.g. "we'll protect the hardwood in the hallway")
- [ ] Deposit
- [ ] Preferred start window

## 3. Win and loss reasons: one from a fixed list

Every closed proposal gets one reason. Free text ("customer went elsewhere") can't be counted; a fixed list shows patterns after a few months. Add a reason only by decision.

| Won | Lost |
|---|---|
| Price | Price |
| Trust/referral | Timing |
| Speed | Chose another contractor (for what reason, if known) |
| Options | Project cancelled |
| Design | No response |
| Availability | Not a fit after all |
| | |
| | |

## 4. Follow-up sequence: one per sent proposal

CUSTOMER AND JOB

PROPOSAL OWNER

AMOUNT

SENT ON

DECISION DATE AGREED

NEXT STEP AND DATE

| When | What | Date | Done |
|---|---|---|---|
| **Day 0** | Walk through the proposal with the decision makers, live or by video. Agree a decision date | | |
| **Day 2** | Short message: "Any questions after looking it over?" | | |
| **Days 5 to 7** | Call. Ask what's left to decide; adjust options if needed | | |
| **Decision date** | Call: "You mentioned you'd decide this week. Where are you?" | | |
| **Day 21** | Message: "Should I keep this open, or have your plans changed?" | | |
| **Day 30** | Close it as lost if there's no answer, and record the reason as "no response" | | |

**Example timing; adjust to your sales cycle.** Larger jobs with design work take longer; small jobs move faster.

CLOSED AS: WON OR LOST

REASON, FROM THE FIXED LIST

CLOSED ON

## 5. Find where the pipeline leaks

Count each stage for the last month or quarter. **Conversion = this stage ÷ the stage above it.** Example numbers, made up.

| Stage | Example count | Example conversion | Our count | Our conversion |
|---|---|---|---|---|
| Leads | 80 | | | |
| Qualified as go | 44 | 55% of leads | | |
| Site visits done | 40 | 91% of go leads | | |
| Proposals sent | 28 | 70% of visits | | |
| Signed | 9 | 32% of proposals | | |

In the example the close rate is the lowest number, but the first leak to look at is visits to proposals: 12 visits never became a proposal, and each one already cost an estimator's time. Estimators too busy to write them, visits to jobs that weren't qualified properly, or customers who went quiet because nothing was booked: each has a different fix.

OUR FIRST LEAK TO LOOK AT

DAYS FROM SITE VISIT TO PROPOSAL (A NUMBER YOUR TEAM CONTROLS)

WHAT WE FOUND, AND THE FIX

## 6. Weekly pipeline review: 30 minutes

Same day every week, with everyone who owns leads or proposals. Keep it to the list; detailed deal strategy happens afterwards, between the people involved.

DAY AND TIME

WEEK OF

WHO ATTENDS

1. **New leads (5 minutes):** how many, from where, how many qualified as go.
2. **Stuck items (10 minutes):** every lead or proposal past its time limit or without a next step. Each gets a next step, an owner and a date.
3. **Big open proposals (10 minutes):** the largest few. What's the decision date? What does the customer still need?
4. **Wins, losses and capacity (5 minutes):** what closed and why, and whether signed work fits the crews' schedule. If the backlog is full for the next two months, sales needs to know before promising start dates.

NEW LEADS THIS WEEK

FROM WHERE

QUALIFIED AS GO

### Stuck items

| Lead or proposal | Past its time limit, or no next step | Next step | Owner | Date |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
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| | | | | |

### Big open proposals

| Proposal | Amount | Decision date | What the customer still needs |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

WON AND LOST THIS WEEK, WITH REASONS

EARLIEST START DATE SALES CAN PROMISE

## What to review each week

| What to review | This week |
| --- | --- |
| Leads and proposals past their time limit | |
| Days from site visit to proposal | |
| Close rate, and the top win and loss reasons this month | |

LESSON 5 · SPREADSHEET · LEAD-SOURCE-TRACKING-SPREADSHEET.XLSX

# Lead Source Tracking Spreadsheet

**Spreadsheet lead-source-tracking-spreadsheet.xlsx** came with this toolkit. Open it in Excel, Numbers or Google Sheets (File > Import). Yellow cells are yours to type; gray cells calculate. This page says what is in it.

## Lead log: one row per lead, from the first call to the end

Record the source at first contact, as a required field: where they first heard about you. If a referral then looked you up on Google, it's a referral. Ask "How did you hear about us?" on every call. One source per lead, from the fixed list in the Source column. No new sources without a decision: twelve spellings of "Google" make the report useless. Lead service: one line per service you pay, typed with its name. Every lead has one owner and a next step with a date. The Outcome column fills in from the Stage.

- Every lead, followed to won or lost

## Source report: once a month, or once a quarter if your volume is low

Close rate here is won ÷ proposals. The tinted rows are a made-up quarter from the lesson: type over them with your own totals. The decision isn't automatically "drop the source with the lowest close rate." It might be the only one that fills a slow month. You can cap it, change the job types you accept from it, or move the money to asking every happy customer for a referral.

- Estimator time
- Source report for the period
- Counted from the Lead log tab
- Leads with no source recorded

## Match marketing to crew capacity

Backlog: the signed work not yet done, measured in crew-weeks. Check it in the weekly pipeline review; the sheet says which rule applies.

- Your rules (example values; set your own)
- Backlog, week by week

CONTRACTOR SCALER HUB · TOOLKIT

# Back to the course

Every file in this toolkit follows a lesson of **Build a Sales Process Your Team Can Run** on the Contractor Scaler Hub: when a lesson's example changes, its file changes too. Reread the lesson when a file asks for a number you do not have yet.

All six courses: **motionops.com/scaler-hub**

## Spreadsheets in this toolkit

- **Lead Source Tracking Spreadsheet**: lead-source-tracking-spreadsheet.xlsx

## See every job in one system

Book a demo. A MotionOps specialist shows you how your office and crews run every job in one place, from the first request to the final payment. **motionops.com/demo**