MotionOps

CONTRACTOR SCALER HUB · BUILD A SALES PROCESS YOUR TEAM CAN RUN

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
- [ ] Budget range discussed
- [ ] Lead score
- [ ] 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)

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

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	