

PALEMIA

LEAD RECOVERY PLAYBOOK

A step-by-step process for handling new inquiries from first contact through booking, estimate and follow-up.

HVAC · Plumbing · Roofing · Electrical

HOW TO USE THIS SYSTEM

Read this guide once, all the way through. It takes about 45 minutes.

Then use the tools as you work. The parts of the system are:

- The Lead Recovery Playbook (this document)
- The Lead Tracker (spreadsheet)
- The Lead Opportunity Calculator (spreadsheet)
- The 94-message Quick Response Script Pack (sold separately)

Replace the [brackets] in every script with your company details before using them. Confirm hours, pricing and your booking link before anything goes to a customer.

This system gives your team a repeatable process and tools to measure it. It does not guarantee a specific number of bookings, jobs, revenue or conversion improvement. Your results depend on your market, your crew and your capacity.

PART 1: THE LEAD RECOVERY PROCESS

The five steps of lead recovery

1. CAPTURE. Every inquiry gets written down the same way: name, phone or email, service, where it came from, and when it arrived.
2. RESPOND. A human response goes out the same business day. Fast, short and useful.
3. BOOK. Every qualified conversation moves toward a specific appointment: a time, a date and a name.
4. ESTIMATE. A written estimate follows the appointment. The customer gets a copy, and it goes into the tracker.
5. FOLLOW UP. Open items get follow-ups on a schedule until you have a decision. Closed items get a review request or an archive note.

One more rule: nothing sits unanswered past the end of the day. If your team cannot respond that day, an automated message does it for them.

PART 2: MISSED CALL AND NEW LEAD RESPONSE SCRIPTS

How to customize every script in this guide

Replace the [brackets]. Confirm the hours and the booking link before you send anything. Keep text messages short; customers read them on a phone while standing next to a job site.

A text message limit is about 160 characters. Longer texts still deliver, but keep the first text short and save the detail for email.

MISSED CALL - BUSINESS HOURS

Text: "Hi [First Name], this is [Your Name] with [Company Name]. Sorry we missed your call - we're out on jobs. What can we help you with? You can also book directly: [Booking Link]"

If they were price-shopping, lead with the appointment: "We can give you an exact number, but we'll need about 10 minutes on-site. The soonest I have is [Day] at [Time]. Does that work?"

Voicemail (record on your line): "Thanks for calling [Company Name]. We're out on jobs right now. Leave your name, number and what you need, and we'll call you back today. If it's urgent, call [Mobile Number] or book directly at [Booking Link]."

Voicemail drops response time to minutes. Record one and turn it on.

MISSED CALL - AFTER HOURS

Text: "Hi [First Name], this is [Your Name] with [Company Name]. We're closed right now but I saw your call. What's going on? If it's an emergency - active water, no heat or cooling, or a safety issue - call [Mobile Number] and we'll take care of you. Otherwise, book a time that works for you: [Booking Link]"

Define what counts as an emergency before you need the script: water where it should not be, no heat in freezing weather, no cooling in a heat wave, burning smell or sparking panel. Write your list down and give it to everyone who answers the phone.

NEW LEAD - WEBSITE FORM, GOOGLE, FACEBOOK OR REFERRAL

Text: "Hi [First Name], this is [Your Name] from [Company Name]. Thanks for the [Service] request. I can look at it [Today/Tomorrow]. I have [Time] [Day] or [Time] [Day]. Which works better?"

Email, subject "[Service] request - [Company Name]":

"Hi [First Name], thanks for reaching out about the [Service]. I have [Time] [Day] or [Time] [Day] open. If one of those works, reply or book directly: [Booking Link]"

If it's urgent - [emergency list] - call [Mobile Number] right now and we'll prioritize it.

[Your Name], [Company Name]"

Referral source: thank the referrer. "Hi [Referrer], thanks for sending [First Name] our way - we'll take good care of them."

Respond to every new lead the same way: ask one qualifying question, offer two times, make booking easy.

PART 3: ESTIMATE FOLLOW-UP SYSTEM

An estimate that gets no decision is the most valuable thing in this system. Most estimates die from silence, not from price.

The schedule: send the estimate in writing within 48 hours of the appointment. Follow up on Day 2, Day 5 and Day 10, then every 2 weeks until a decision. Log every touch in the Lead Tracker.

Never follow up with "just checking in." Every follow-up carries something new: a question, a photo, a slot, a comparison.

ESTIMATE FOLLOW-UP - DAY 2

Text: "Hi [First Name], this is [Your Name] with [Company Name]. Did the estimate for the [Service] arrive okay? Happy to walk through it - I have [Time] [Day] or [Time] [Day]."

ESTIMATE FOLLOW-UP - DAY 5

Text: "Hi [First Name], quick question on the [Service] estimate: what's the biggest thing you're weighing? Happy to answer it - sometimes it's a 2-minute answer."

ESTIMATE FOLLOW-UP - DAY 10

Text: "Hi [First Name], last check from me on the [Service] estimate. If the timing isn't right, no problem at all - just reply "not now" and I'll stop following up. If it's a go, here's the next step: [Booking Link]"

The "not now" exit matters. It gives the customer an easy out and keeps the door open instead of training them to ignore you.

PART 4: OBJECTION RESPONSE LIBRARY

The five objections that come up in every trade

Every response below does the same three things: acknowledge, add information, and offer a next step. None of them argue.

"YOUR PRICE IS TOO HIGH."

Acknowledge: "I understand. Let's compare what's included."

Add information: "We use [Brand] equipment with a [Warranty] warranty, we pull the permit, and we warranty our work for [Term]. If you have a lower number, ask that company two questions: who installs it, and what the warranty is."

Next step: "If they match on both, I'd ask what makes us worth the difference. If you just need time, that's fair - when you've had a chance to look it over, I'll follow up. Is [Day] at [Time] good for a call?"

"I'M GETTING OTHER QUOTES."

Acknowledge: "You should. Three quotes is a healthy process."

Add information: "Here's what to compare: the scope, the equipment brand, the warranty and the timeline. Not all quotes cover the same four things."

Next step: "When your quotes come in, I'm happy to walk through the comparison with you - reply to this number any time."

"I NEED TO TALK TO MY SPOUSE."

Acknowledge: "Of course."

Add information: "Let me make that conversation easy: here's a one-page summary with the price, the scope and the timeline." [Attach or link the one-pager.]

Next step: "What day works better for the three of us to talk: [Day] or [Day]? I can walk you both through it in 10 minutes."

"WE'RE GOING TO WAIT."

Acknowledge: "That's your call, and I respect it."

Add information: "Two things worth knowing while you decide: [Seasonal/factual note relevant to the job], and our current schedule is booking [Lead Time] out."

Next step: "Want me to check back [Timeframe]? If something changes on your end, I'm at this number."

"ANOTHER COMPANY QUOTED LESS."

Acknowledge: "I hear you - and the gap is worth understanding."

Add information: "Ours includes [X] and [Y] that quote may not. Ask them directly: does this include permit, haul-away, [specific item]?"

Next step: "If they match on scope and warranty and still come in lower, I'd take their quote. If they don't, the gap has a reason. Want me to put the comparison in writing?"

PART 5: TRADE QUICK STARTS

HVAC

Prioritize: no cooling in extreme weather, no heat in freezing weather, and system replacements. Lead with availability, not price.

Before quoting: ask system age and any repair history. Offer the replacement conversation when repair costs pass a threshold you set. Keep maintenance agreements in the tracker as separate pipeline entries.

Situations to route: no cooling, no heat, repair, replacement, maintenance, system age, urgency.

Text opener: "Hi [First Name], this is [Your Name] with [Company Name]. Sorry we missed you - what's going on with the system?"

PLUMBING

Treat active water as urgent, drain blockages as same-day, water heater and sewer work as estimate-first.

Before quoting: ask "is water coming in right now?" on every call. Protect a same-day slot for active leaks every day. Water heaters: ask for the age and a photo before quoting. Sewer: set the expectation for a

camera inspection upfront.

Situations to route: active leak, drain blockage, no water, water heater, sewer, urgency.

Text opener: "Hi [First Name], this is [Your Name] with [Company Name]. Sorry we missed you - is water coming in anywhere?"

ROOFING

Roof jobs are mostly estimate jobs. Respond fast, but expect the decision to take longer and follow up on a schedule.

Before quoting: ask about storm damage and insurance involvement early. Photograph at the inspection and send the estimate within 48 hours, in writing. Follow-up schedule: Day 2, Day 5, Day 10, then every 2 weeks until a decision.

Situations to route: active leak, repair, replacement, storm damage, roof age, insurance involvement.

Old estimates are the biggest recovery opportunity in roofing. Work the backlog.

Text opener: "Hi [First Name], this is [Your Name] with [Company Name]. Sorry we missed you - is anything coming in through the roof?"

ELECTRICAL

Separate emergencies from estimate work. Safety concerns jump the queue.

Before quoting: ask "is anything sparking, burning, or dead?" before scheduling. Panel upgrades, EV charger installs and generator installs are estimate-first. Safety escalation: burning smell, sparking, or water near the panel means same day, always.

Situations to route: power outage, breaker issues, installation, panel work, safety escalation, estimate requests.

Text opener: "How can we help? We handle everything from outlets to panel upgrades."

PART 6: THE 30-MINUTE INSTALL

0-5 min: Choose the services you want to prioritize.

5-10 min: Customize your missed-call and new-lead messages - replace the brackets with your details.

10-20 min: Set your follow-up schedule. Put it on the calendar or in the tracker.

20-25 min: Enter active leads and estimates into the tracker: name, service, source, date added, next action, next action date.

25-30 min: Schedule the next action for every open opportunity - a real day and time.

Then it runs. Revisit monthly: archive closed items, add new ones, adjust response times as the team grows.

PART 7: MEASURE WHAT MATTERS

Five numbers, once a week:

1. Time to first response. Start when a lead arrives. Stop when a human sends a response.
2. Same-day response rate. What share of leads got a response the same business day.
3. Appointment rate. What share of qualified conversations led to a booked appointment.
4. Estimate-to-decision time. From estimate sent to yes or no. Long waits are where revenue quietly disappears.
5. Follow-up completion rate. What share of scheduled follow-ups actually happened.

Palemia can answer inquiries, capture lead information, follow up, and route to a person when needed. Book an Automation Assessment at <https://app.palemia.com/book/palemia-demo>.