



CONTRACTOR / PRINTABLE FIELD GUIDE

Lead Follow-Up and Pipeline Worksheet

A simple operating rhythm so valid requests do not disappear between first contact and signed work.

Response standard

Assign every inquiry to one owner and record its source, service, address or area, urgency and best contact method.

Set an internal response target based on your capacity and business hours. Confirm an appointment or next step in writing.

Use customer preferences and applicable contact rules. Keep outreach relevant and stop when asked.

Follow-up sequence

After inquiry: acknowledge, qualify fit and propose a time to talk.

After visit: send a clear proposal with scope, assumptions and a decision date when appropriate.

After proposal: ask whether the customer has questions or wants a revision; log the actual answer. Avoid repeated generic messages.

Pipeline review

New / Attempting contact / Qualified / Visit scheduled / Proposal sent / Pending decision / Won / Lost.

Each open item needs a next action, owner and date. Compare inquiries to booked visits, proposals to wins, and revenue to lead source.



Printable pipeline rows

Lead / source / service / stage / next action / due date / owner

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Sample next-step note

"Thanks for walking us through your project. We will send the written scope and options by Thursday. Would Friday afternoon work to answer questions?" Record the agreed time in the pipeline.

Turn this worksheet into a coached sales process:
academy.saferpros.com/home-improvement-sales-academy/ • Call 1-800-HIRE-A-PRO
(1-800-447-3277).

Sources and further reading

SBA: Marketing and Sales - <https://www.sba.gov/business-guide/manage-your-business/marketing-sales>

SBA: Manage Your Finances - <https://www.sba.gov/business-guide/manage-your-business/manage-your-finances>

Educational guidance for U.S. readers. Requirements, permits, licenses, consumer rights and payment rules vary by location and project. Check current local rules and your written agreement. Safer Pros is a referral and project-support platform; participating providers are independent businesses.

Additional notes and next actions
