



CONTRACTOR AI LAB

MISSED LEAD RECOVERY CHECKLIST

A 10-minute self-audit for home-service companies

Find the gaps between an incoming customer request and a booked job - before buying more software.

How to use it

Score every statement honestly. Do not give yourself two points because a good employee usually remembers what to do. A strong process is visible, repeatable, and measurable.

2 POINTS	Consistently true and documented
1 POINT	Sometimes true or handled informally
0 POINTS	Not true or unknown

Your goal is not a perfect score. Your goal is to identify the first customer-journey gap worth fixing and test a small improvement for 30 days.

Score your current process

Mark one score for each line. Each section has a maximum of 10 points.

1. Incoming calls and forms

	We can see how many incoming calls go unanswered each week.	0 1 2
	Every missed caller receives an appropriate acknowledgment within a defined time.	0 1 2
	Every web form creates a visible record with an owner and status.	0 1 2
	Duplicate inquiries are recognized rather than treated as separate customers.	0 1 2
	Requests outside our service area receive a clear, respectful response.	0 1 2

Section score: _____ / 10

2. Qualification and routing

	We collect only the information needed to route the request.	0 1 2
	Urgent requests are clearly separated from ordinary requests.	0 1 2
	Safety concerns are escalated to a person and never automatically diagnosed.	0 1 2
	Staff can see the customer's original words, not only an automated summary.	0 1 2
	Every qualified lead has a named owner or queue.	0 1 2

Section score: _____ / 10

Score your current process

3. Human follow-up

	Staff are alerted when a qualified lead needs a response.	0 1 2
	The automation stops when a team member takes over.	0 1 2
	We track the time between inquiry and first useful response.	0 1 2
	We make more than one reasonable attempt when a qualified customer does not answer.	0 1 2
	Customers have an obvious way to reach a person.	0 1 2

Section score: _____ / 10

4. Estimates and old leads

	Every unsold estimate has a next follow-up date.	0 1 2
	Follow-up stops immediately when the customer replies or opts out.	0 1 2
	We record why estimates are won, lost, or still undecided.	0 1 2
	Old customers are organized by service history and likely future need.	0 1 2
	Reactivation messages are relevant, truthful, and permission-aware.	0 1 2

Section score: _____ / 10

Score your current process

5. Measurement and safety

	We can connect each booked job to its lead source.	012
	We measure completed-job gross profit rather than celebrating leads alone.	012
	Automated actions are logged and can be reviewed.	012
	New workflows are tested with fictional records before launch.	012
	Access is limited, protected with two-factor authentication, and removed when no longer needed.	012

Section score: _____ / 10

Your result

Total score: _____ / 50

41-50	Strong foundation. Improve reporting, exception handling, and testing.
26-40	Several working processes, but inconsistent ownership or follow-up may be costing opportunities.
0-25	Fix the customer journey before purchasing a complicated collection of tools.

Choose the first improvement

Select the three gaps most likely to affect qualified customers. Then choose only one for the first 30-day test.

- 1. _____
- 2. _____
- 3. _____

Simple value estimate

Missed or unworked qualified leads per month	_____
Realistic percentage that could be recovered	_____
Realistic booking percentage after recovery	_____
Average gross profit per completed job	\$ _____

Estimated monthly gross-profit opportunity = qualified leads x recovery percentage x booking percentage x gross profit per job

This is a planning estimate, not a guarantee. Record your baseline and validate the result through a limited pilot before expanding.

NEXT STEP

Choose one gap, assign one owner, and run a 30-day test. For an independent review, request a Contractor AI Lab Revenue Leakage Audit.