UNSOLD ESTIMATE & FOLLOW-UP RECOVERY AUDIT

SAMPLE REPORT

Prepared for
Summit Ridge Roofing
Kansas City Metro

Residential roofing, gutters, and storm restoration

PROCESS SCORE 27/50

Significant recovery opportunity likely

Core question: Which already-estimated jobs are still worth recovering, why are they stalling, and how should they be pursued?

Fictional sample. All company details and opportunity records in this report are invented for demonstration purposes.

WHAT THE REVIEW FOUND

Executive Summary

Summit Ridge Roofing has a workable estimating process, but the post-estimate follow-up system is inconsistent. The biggest issue is not the number of estimates being generated; it is the lack of a disciplined next-action process after an estimate is delivered. Older opportunities become difficult to distinguish from genuinely lost work, and lost/stalled reasons are recorded inconsistently.

The reviewed sample contains meaningful near-term recovery candidates, especially estimates less than 90 days old where the prospect engaged, no definitive loss reason was recorded, and follow-up stopped after one or two attempts. The recommended priority is to work those opportunities first while simultaneously creating a standard five-touch post-estimate cadence and requiring every active estimate to have one owner and one scheduled next action.

58 RECORDS REVIEWED	**12** HIGH-PRIORITY	**$812K** QUOTED VALUE REPRESENTED
18 MEDIUM-PRIORITY	**19** LOW-PRIORITY	**9** REVIEW / DO NOT PRIORITIZE

Post-Estimate Process Scorecard

Category	Score	Assessment
Estimate Delivery & Handoff	6/10	Estimate delivery is timely, but ownership and next action are not always documented.
Follow-Up Discipline	5/10	Most estimates receive one or two touches; cadence varies by estimator.
Pipeline Visibility	6/10	Open estimates are visible, but stale opportunities are not consistently surfaced.
Lost / Stalled Reason Quality	4/10	Too many records use vague or blank reasons.
Reactivation Practice	6/10	Occasional reactivation occurs, but there is no recurring review process.

WHERE TO WORK FIRST

Recovery Opportunity Portfolio

Segment	Count	Quoted Value	Priority	What it means
0–30 days / engaged	8	$141,500	High	Recent estimates with meaningful prior engagement and no definitive loss reason.
31–90 days / no decision	10	$176,300	High	Many show incomplete follow-up rather than a confirmed loss.
Postponed / timing-related	7	$102,800	Medium	Good reactivation candidates if timing is respected.
Price objection	11	$155,900	Medium	Worth selective follow-up, especially where scope options were not discussed.
90+ days / vague status	13	$188,400	Low	Require manual review before contact.
Definitively lost / poor fit	9	$47,100	Review	Do not prioritize for recovery.

Recommended first move: Work the recent/engaged and 31–90 day no-decision segments before touching older or poorly documented records.

RECOVERY SEGMENTATION PLAYBOOK

Do not work every old estimate the same way. Use the record age, engagement history, stall reason, and quoted value to determine the message and urgency.

Segment	Primary objective	Recommended approach	Avoid
0–30 days / engaged	Remove a current obstacle	Personal, direct follow-up tied to the specific project. Ask one decision-driving question.	Generic “just checking in” messages
31–90 days / no decision	Reopen the conversation	Reference the estimate, ask what changed, and offer to clarify scope/timing.	Assuming silence means “lost”
Postponed / timing-related	Respect timing and secure a future date	Acknowledge the prior timing issue and ask whether the planned window has changed.	Repeated urgency or discounting
Price objection	Identify whether price is the real obstacle	Clarify scope, options, financing, phasing, or value before discussing concessions.	Immediate discounting
90+ days / weak history	Qualify before spending time	Use a short reactivation message; continue only when there is engagement.	Long manual chase sequences
Definitive loss / competitor chosen	Protect the relationship	Close cleanly, record the reason, and consider a future seasonal/check-in touch if appropriate.	Treating a closed loss like an active estimate

Management rule: High-priority records get individual attention. Medium-priority records get selective follow-up. Low-priority and review records should not consume the same amount of staff time.

SAMPLE OF THE HIGHEST-PRIORITY RECORDS

Top 10 Recovery Priorities

ID	Age	Value	Service	Score	Stall	Recommended next action
SR-1048	18 days	$22,600	Roof replacement	22/25	No decision	Confirm timing and obstacle; schedule next action
SR-1033	26 days	$18,900	Roof + gutters	22/25	No response	Short check-in focused on unanswered questions
SR-1017	41 days	$31,400	Storm restoration	21/25	Insurance timing	Revisit timing and claims status
SR-1061	12 days	$15,200	Roof replacement	21/25	Thinking	Decision-status follow-up
SR-0994	62 days	$27,800	Roof replacement	20/25	Postponed	Timing-based reactivation
SR-1025	37 days	$12,700	Gutters	20/25	No response	Low-friction re-engagement
SR-0972	78 days	$34,600	Roof + siding	19/25	Price	Offer scope clarification, not discount-first
SR-1054	21 days	$9,800	Roof repair	19/25	No decision	Direct yes/no/timing check

SR-1009	53 days	$16,300	Roof replacement	18/25	Unknown	Clarify status before closing out
SR-0958	89 days	$25,900	Storm restoration	18/25	Timing	Reactivation tied to project timing

HOW TO INTERPRET THE PRIORITY SCORE

The 25-point score is an internal work-ordering tool, not a prediction of close probability. It combines economic value, recency, prior engagement, reason recoverability, and data confidence.

Band	How to use it	Recommended treatment
20–25 / High	Work first	Individual review, personal outreach, dated next action
14–19 / Medium	Work selectively	Batch by stall reason, then personalize where engagement appears
8–13 / Low	Defer or light-touch	Use low-cost reactivation; stop if there is no signal
0–7 / Review	Validate before pursuing	Confirm the record is real, current, and not definitively lost

STALL-REASON RESPONSE PLAYBOOK

A useful stalled/lost reason should change the next action. If the reason does not change what the team does next, it is probably too vague.

Stall reason	What it may mean	Best next move	Suggested angle
No response	Busy, undecided, low urgency, or unanswered question	Use a short decision-status message and one easy question.	"Is this still something you want to solve?"
Timing / postponed	Need exists, but project window moved	Ask for the new target window and schedule a future touch.	"Has the timing changed since we last spoke?"
Price / budget	Could be total price, cash flow, financing, or unclear value	Clarify the actual objection before changing price.	"Is the obstacle total budget, monthly cash flow, or scope?"
Scope uncertainty	Prospect may not understand options or what is included	Simplify choices and restate the recommended scope.	"Would it help if I broke the options into good/better/best?"
Insurance / financing	Decision depends on an external process	Track the dependency and set a date to revisit.	"Where does the claim/approval stand now?"
Competitor / chose another	True loss, unless project later changes	Record reason accurately and close the active opportunity.	Protect relationship; do not keep chasing.

WHY ESTIMATES ARE STALLING

Top Process Findings

1. No required next action after estimate delivery

Evidence: Several open estimates have no scheduled follow-up date or owner action.
Why it matters: Active opportunities can appear healthy in the pipeline while effectively being abandoned.
Recommended correction: Require one owner and one dated next action for every open estimate.
Priority: Immediate
Implementation effort: Low

2. Follow-up ends too early

Evidence: Many records show one or two touches followed by silence.
Why it matters: Prospects who are undecided or busy are being treated like lost opportunities.
Recommended correction: Adopt a five-touch 14-day sequence, then move unresolved records to a future-timing or reactivation status.
Priority: High
Implementation effort: Low

3. Stall reasons are too vague

Evidence: Blank, "no response," and generic lost statuses dominate the older records.
Why it matters: The business cannot distinguish timing problems from price, competition, or true disqualification.
Recommended correction: Use a short controlled list of meaningful stalled/lost reasons.
Priority: High
Implementation effort: Low

4. Older estimates are reviewed inconsistently

Evidence: There is no scheduled 30/60/90-day reactivation review.
Why it matters: Potentially recoverable work depends on individual memory.
Recommended correction: Create a recurring monthly recovery review using age, value, and prior engagement.
Priority: High
Implementation effort: Moderate

5. Price objections are not separated from scope objections

Evidence: Some price-labeled losses contain notes suggesting uncertainty about scope or options.
Why it matters: Discounting may be considered before the actual objection is understood.
Recommended correction: Use a clarification message before offering price concessions or closing the opportunity.
Priority: Medium
Implementation effort: Low

Recommended 14-Day Recovery Sequence

Timing	Recommended action
Day 0	Personalized reactivation message referencing the project and asking where the decision stands.
Day 2	Short follow-up with one easy question: timing, unanswered question, or obstacle.
Day 5	Offer clarification on scope, timing, financing, or project details based on the record.
Day 9	Direct decision-status check: move forward, revisit later, or close the file.
Day 14	Close-the-loop message with a future-timing option instead of endless follow-up.

CUSTOMIZE BEFORE SENDING

Recovery Message Templates

Simple check-in

Hi [First Name] — I wanted to circle back on the [project/service] estimate we sent over. Are you still considering the project, or has the timing changed? If there's a question holding things up, I'm happy to clarify it.

Timing / postponed job

Hi [First Name] — when we last discussed the [project], it sounded like timing might be the main issue. I wanted to check whether the project is back on your radar or if a later date would make more sense. Either way, I can update our notes.

Decision / obstacle removal

Hi [First Name] — before I close the loop on the estimate, I wanted to ask one quick question: is the main issue timing, budget, scope, or something else? If there's something we can clarify, I'm happy to help.

RECOVERY DATA HYGIENE RULES

- Every open estimate needs one owner, one meaningful status, and one dated next action.
- "No response" is an activity result, not a useful lost reason. Record what is actually known.
- Definitive losses should leave the active recovery pool instead of remaining stale forever.
- Future-timing opportunities need a specific revisit date rather than an indefinite "follow up later."
- When the reason is unclear, mark it for review instead of inventing certainty.

These rules make the recovery list smaller, more credible, and easier for management to act on.

ADDITIONAL RECOVERY MESSAGES

These are starting points, not mass-blast scripts. Personalize the project/service reference and do not imply urgency, discounts, or availability that is not real.

Price / budget clarification

Hi [First Name] — when we last talked about the [project], price seemed to be one of the concerns. Before I assume the project is off the table, was the issue the total budget, the scope, or simply the timing of the spend? If helpful, I can clarify the options without changing anything on your end.

Older estimate reactivation

Hi [First Name] — we prepared an estimate for your [project] a while back and I wanted to check whether it is still on your radar. If the project moved, changed, or is no longer a priority, no problem. If it is still active, tell me what changed and I can help you figure out the next step.

Close-the-loop message

Hi [First Name] — I do not want to keep chasing you if the timing is not right. Should I keep the [project] open, circle back later, or close it out for now? A one-word reply is completely fine.

30-Day Recovery Action Plan

Days 1–7 — Build and start

- Clean obvious statuses and remove definitively lost records from the active recovery pool.
- Assign owners to the 12 high-priority opportunities.
- Begin the 14-day sequence and require a dated next action.

Days 8–14 — Work the pipeline

- Work the medium-priority pool selectively.
- Standardize the post-estimate follow-up cadence for all new estimates.
- Begin using meaningful stalled/lost reasons.

Days 15–30 — Stabilize

- Review outcomes from the first recovery wave.
- Create a recurring monthly review of 30/60/90+ day estimates.
- Adjust message angles based on actual responses rather than assumptions.

What Not to Change Yet

- Do not replace the CRM solely to solve this problem; the current system can support a better process.
- Do not build complex automation before the follow-up cadence and status definitions are clear.
- Do not treat every old estimate as a recovery target; work the strongest segments first.
- Do not lead with discounts before understanding whether the true obstacle is price, scope, timing, or uncertainty.

WEEKLY RECOVERY MANAGEMENT REVIEW

A recovery process stays healthy only if someone reviews it. A 15-minute weekly review is enough when the rules are simple and the tracker is current.

Metric	What to review	Why it matters
Open unsold estimates	Count and quoted value by age bucket	Shows how much opportunity is sitting unresolved.
High-priority records	How many have an owner and dated next action	Confirms the strongest opportunities are actively managed.
Stale records	No activity or next action past due	Surfaces silent abandonment before it becomes permanent.
Recovery conversations	Replies / meaningful conversations started	Separates activity from actual engagement.
Reactivated jobs	Opportunities returned to an active buying process	Shows whether the recovery effort is creating movement.
Won from recovery	Jobs closed after reactivation	Measures realized outcome without inventing projected ROI.
Loss reasons	Top reasons and blank/unknown percentage	Improves future estimating and follow-up decisions.

15-minute agenda

- 1. Review high-priority records first; every one needs an owner and next action.
- 2. Identify stale records and decide: act now, schedule later, or close.
- 3. Review new replies and reactivated opportunities.
- 4. Capture meaningful lost/stalled reasons rather than “no response.”
- 5. Pick the next week’s recovery focus by segment, not by random record order.

Success does not require contacting every old estimate. The objective is to create a repeatable system that works the best opportunities first and makes the outcome visible.

Final Recommendation

If Summit Ridge Roofing makes only one change immediately, it should be: require every open estimate to have one clear owner and one scheduled next action, then use the recovery-priority list to work the strongest stalled opportunities first.

WHAT THE CLIENT LEAVES WITH

- A prioritized view of the unsold-estimate portfolio and the segments to work first.
- A process scorecard identifying the post-estimate breakdowns creating avoidable leakage.
- A practical 14-day recovery cadence and six customizable follow-up messages.
- A 30-day implementation plan and weekly management review routine.
- A recovery tracker for ownership, next actions, status, and outcomes.

Scope note: This fictional sample illustrates a diagnostic and recommendation engagement. It does not include contacting prospects, campaign execution, CRM cleanup, automation setup, legal/compliance review, or a guarantee of recovered sales or revenue.