THE 30-DAY UNSOLD ESTIMATE FOLLOW-UP PLAN

A practical field guide for home-service companies that want to work existing estimates and customer records before buying more leads.

WHAT THIS PLAN GIVES YOU
A way to choose the first list, calculate the follow-up workload, run a controlled 30-day sequence, track booked and held appointments, and decide what should remain human versus automated.

Use this plan in one sitting

1. Choose one contactable list. Do not combine every customer segment into one campaign.
2. Remove duplicates, completed jobs, opt-outs, unsupported service areas, and records you are not permitted to contact.
3. Start with a controlled batch, review the conversations, then expand only after the process works.

COMPLIANCE CHECKPOINT
Use only records your company is permitted to contact. Honor federal and state do-not-call rules, consent requirements, carrier rules, and every opt-out. A past estimate does not automatically establish permission for automated marketing messages. This guide is general information, not legal advice.

Federal reference: ftc.gov/business-guidance/resources/complying-telemarketing-sales-rule

1. Choose the first list

The strongest starting point is usually the segment with a clear prior reason to respond and a clean path to an appointment.

Segment	Use it when	Hold it when
Unsold estimates	The estimate is still relevant, the service area matches, and no final outcome is recorded.	The job was completed elsewhere, the record is duplicated, or the customer opted out.
Past customers	The prior service creates a relevant maintenance, seasonal, or replacement reason to reconnect.	The relationship is too old, contact permission is unclear, or the service is no longer relevant.
Maintenance due	The equipment or plan record shows a real service window and available capacity exists.	The date is unknown, the appointment is already booked, or the customer is inactive by request.
Leads that stopped	The lead requested service and the inquiry is still recent enough to be useful.	The lead chose another provider, withdrew, or is outside the company's follow-up policy.

Build a clean first batch

- Select a defined age window. Separate recent estimates from older records instead of treating them as equal.
- Remove records that later became jobs, duplicate contacts, existing appointments, disputes, refunds, and opt-outs.
- Add the original service, estimate date, amount if available, status, last contact, phone, email, service area, and CRM record ID.
- Start with 50 to 100 eligible records so the team can inspect every conversation before expanding.

RECOMMENDED FIRST CAMPAIGN
For most home-service companies, begin with recent unsold estimates that remain relevant and have a documented prior inquiry. The reason for the follow-up is visible, the list can be cleaned, and the outcome can be measured as appointments booked and held.

2. Run a controlled 30-day cadence

CHANNEL RULE
Make live calls the primary channel when permitted. Use text or email only where the contractor has confirmed permission and the channel is appropriate. Stop every sequence immediately when a contact opts out.

Timing	Action	Purpose	Record
Day 1	Call the first batch. If permitted, send a contextual message after no answer.	Reopen the original conversation.	Disposition, notes, next step
Day 3	Second live-call attempt at a different time of day.	Reach contacts missed on day 1.	Connection and interest
Day 7	Send one relevant reminder where consent permits, or make the final live-call attempt.	Offer a clear decision without pressure.	Yes, no, later, opt-out
Day 14	Review objections, list quality, contact rate, and booked appointments.	Correct the process before expanding.	Change log
Day 21	Launch the revised batch only if quality and compliance checks pass.	Scale the working segment.	Batch and owner
Day 30	Report contacts, conversations, appointments booked, appointments held, and next recommendation.	Make the next decision from outcomes.	Final scorecard

What not to do

- Do not upload the entire CRM before reviewing eligibility and suppression rules.
- Do not use a generic blast that hides why the company is contacting the customer.
- Do not keep contacting someone who declined, opted out, or completed the job elsewhere.
- Do not report form fills or conversations as booked appointments.

3. Use a reason-first conversation

The opening should remind the customer why your company has their information, provide a relevant reason to respond, and make the next step clear.

Unsold estimate call opener

CALL SCRIPT
Hi [First Name], this is [Name] with [Company]. You asked us about [service] and we still have the estimate from [month]. I am calling to see whether the work was completed or whether you would like to review available appointment times.

Past-customer service call opener

CALL SCRIPT
Hi [First Name], this is [Name] with [Company]. We helped with [prior service], and I am reaching out because [specific maintenance or seasonal reason]. Would you like to look at appointment times, or is the service no longer needed?

Permission-based message

MESSAGE TEMPLATE
Hi [First Name], this is [Name] with [Company]. We are following up about [specific estimate or prior service]. If you would like available appointment times, reply YES. Reply STOP to opt out.

Disposition every response

Disposition	Next action
Appointment requested	Confirm service, address, time window, and booking destination.
Interested later	Record the requested date and obtain permission for the follow-up.
Job completed elsewhere	Close the estimate and stop the sequence.
Not interested	Close the record and apply the company's suppression rule.
Opt-out	Stop immediately and update every connected system.

4. Calculate the workload before launching

Use editable assumptions. The point is to understand the operating load, not predict a result.

Input	Your number	Planning formula
Eligible estimates	[ ]	Clean records remaining after suppression
Touches per estimate	[ ]	Calls plus permitted follow-up messages
Total planned touches	[ ]	Eligible estimates x touches per estimate
Weekly touch target	[ ]	Total planned touches / 4
Estimated minutes per touch	[ ]	Use your team's observed average
Estimated team hours	[ ]	Total touches x minutes / 60

Illustrative booked-job scenarios

Contacted estimates	1% book	3% book	5% book
50	0 to 1	1 to 2	2 to 3
100	1	3	5
250	2 to 3	7 to 8	12 to 13
500	5	15	25

These are illustrative planning figures. The percentages mean the share of contacted, eligible estimates that become booked jobs. They are not predictions, guarantees, or Cactus customer outcomes.

Score the stages separately

Records contacted	Conversations	Booked	Held	Jobs booked
[ ]	[ ]	[ ]	[ ]	[ ]

5. Decide what stays human and what gets automated

Human control	Automation support
Choose the customer segment and exclusions.	Apply the approved campaign to the selected list.
Approve the offer, service area, hours, and booking rules.	Complete consistent call and permitted-message follow-up.
Handle escalations, disputes, and unusual customer requests.	Record dispositions, responses, and appointment outcomes.
Review conversations and decide whether to expand.	Maintain the cadence without depending on staff memory.

How Cactus can operate the plan

Cactus can work directly with Jobber and Housecall Pro. For another CRM, the contractor can export the customer or estimate records it chooses and upload a controlled list. Cactus then uses the approved calls and messages to move qualified interest toward the contractor's booking workflow.

BRING ONE REAL LIST TO THE REVIEW
In a 20-minute Revenue Opportunity Review, Cactus will help identify the first eligible segment, the data needed, the contact rules, the booking path, and the controlled starting batch.

SEE AVAILABLE REVIEW TIMES

go.oncactus.com/book-a-demo

KEEP THE MEASUREMENT HONEST
A downloaded plan is not a booked demo. Track lead-magnet leads, qualified leads, booked demos, held demos, and customers as separate stages.