HYPOTHETICAL CASE STUDY

Building a Consistent Estimate Follow-Up System for a Roofing & Exterior Remodeling Contractor

Company: Summit Home Exteriors
Industry: Roofing, Siding & Exterior Remodeling
Employees: 14
Years in Business: 11
Operational Problem: Estimates Aren't Followed Up Consistently
Systems: Jobber, QuickBooks, Gmail, Google Calendar
Engagement: Fix One — $499

> **Hypothetical Case Study:** Summit Home Exteriors is a fictional company created to demonstrate how Contractor Systems Group approaches a common operational problem. Company information, operating data, and circumstances in this case study are hypothetical. No actual client results are being represented.

HYPOTHETICAL CASE STUDY **1**
Building a Consistent Estimate Follow-Up System for a Roofing & Exterior Remodeling Contractor 1
Executive Summary **4**
1. The Business Situation **5**
Estimates Aren't Followed Up Consistently 6
2. What the Diagnostic Revealed **6**
There was no defined follow-up sequence. 6
Follow-up was regularly delayed. 7
Responsibility existed, but accountability was incomplete. 7
Management visibility required manual effort. 7
Lost-opportunity information was weak. 7
3. The Current-State Workflow **8**
4. Root-Cause Diagnosis **9**
Primary Diagnosis: No Defined Estimate Follow-Up Process 9
5. Secondary Diagnoses **10**
Weak Follow-Up Control & Reminder Mechanism 10
Incomplete Estimate Outcome Tracking 10
6. What We Did Not Blame **11**
Employee Performance 11
Staffing 11
Technology 11
The Owner 11
7. Establishing the BEFORE Baseline **11**
Estimate Volume 12
Estimate Conversion 12
Estimated Jobs Won Per Week 12
Estimates Not Converting 12
Annualized Estimate Volume 12
Follow-Up Compliance 12
Time to First Follow-Up 12
Estimates Going More Than One Week Without Follow-Up 12
Lost-Reason Completion 13
8. The Financial Context **13**
UNKNOWN 13
9. The Solution Design **13**
Standardized Estimate Follow-Up System **13**
10. The Core Operating Rule **14**
ACTIVE ESTIMATE = OWNER + NEXT ACTION **14**
11. Proposed Future-State Workflow **14**
12. Proposed Follow-Up Cadence **15**

Day 0 15
Day 2 16
Day 5 16
Day 10 16
Day 21 16
13. Preserve Human Judgment 16
System Responsibility 17
Estimator Responsibility 17
14. Proposed Status Structure 17
Follow-Up Active 18
Customer Responded 18
Nurture / Future Decision 18
Won 18
Lost 18
15. Lost-Estimate Reasons 18
16. Follow-Up Communication Templates 19
Day 2 — Receipt & Questions 19
Day 5 — Check-In 19
Day 10 — Decision Support 19
Day 21 — Final Active Follow-Up 19
17. Exception Handling 19
Employee Forgets a Follow-Up 20
Customer Doesn't Respond 20
Employee Is Absent 20
Customer Has an Objection 20
Customer Wants to Wait 20
System Is Temporarily Unavailable 20
18. Management by Exception 20
19. The Employee Standard 21
20. Technology Recommendation 21
Keep 22
Clarify 22
Standardize 22
Configure 22
Automate 22
AI 22
Additional Software 22
21. What Would Need to Be Configured 23
22. Testing Plan 23
Normal Workflow 23
Customer Response 23

Overdue Follow-Up 24
Employee Absence 24
Won Estimate 24
Lost Estimate 24
Nurture Opportunity 24
Communications 24
Measurement 24
23. Employee Training Plan 24
24. What Would Be Measured 25
1. Follow-Up Compliance Rate 25
2. Time to First Follow-Up 25
3. Estimate Conversion 25
4. Lost-Reason Completion 26
5. Manual Management Time 26
25. What We Would Not Claim 26
26. Implementation Status of This Hypothetical 27
Analysis 27
Root-Cause Diagnosis 27
Baseline 27
Solution Design 27
Build Specification & Assets 27
Software Configuration 27
SOP / Documentation 27
Testing 27
Training 27
Competency 27
Measurement 28
Final Business Result 28
INSUFFICIENT DATA 28
27. What This Engagement Demonstrates 28
28. The Contractor Systems Approach 29
Key Takeaway 30
Every active estimate needs an owner and a next action. 30
About This Case Study 31

Executive Summary

Summit Home Exteriors was producing approximately 20 estimates per week, with an estimated 35% of those estimates becoming jobs.

The owner believed the estimators generally did a good job with customers. The concern wasn't necessarily poor sales performance.

The concern was what happened **after the estimate was sent**.

There was no standard follow-up schedule, no standard number of attempts, no consistent messaging, and no automatic alert when an estimate sat without activity.

Follow-up responsibility generally belonged to the estimator who prepared the estimate, but execution depended heavily on that employee remembering what needed attention while managing the rest of their workload.

As a result, estimates reportedly went more than a week without follow-up several times per week.

Our diagnostic indicated that the central problem wasn't simply:

“Employees need to follow up more.”

The primary issue was:

> **There was no defined estimate follow-up process.**

The recommended solution was therefore not another CRM, an elaborate AI system, or more administrative work.

It was a standardized estimate follow-up system built around one simple operating rule:

> **Every active estimate must have an owner and a next action.**

The proposed system uses the company's existing Jobber environment as the primary operational platform where its capabilities support the workflow, standardizes follow-up timing and messaging, defines ownership and exceptions, improves outcome tracking, and preserves human judgment for actual customer conversations.

Because this is a hypothetical demonstration rather than a completed real-world implementation, no improvement in conversion, revenue, labor hours, or ROI is claimed.

1. The Business Situation

Summit Home Exteriors is a 14-person roofing, siding, and exterior remodeling contractor that has been operating for 11 years.

A typical project falls in the $12,000–$25,000 range.

The company generates approximately:

20 estimates per week

The owner estimated that approximately:

35% of estimates become jobs

The estimated average revenue from a won job was:

Approximately $16,000

The company's existing technology included:

- Jobber
- QuickBooks
- Gmail
- Google Calendar

The selected operational problem was:

Estimates Aren't Followed Up Consistently

The owner suspected opportunities were being lost because estimators became busy and follow-up did not happen consistently.

Instead of immediately recommending automation or additional software, the engagement began by examining how the process actually worked.

2. What the Diagnostic Revealed

Twenty structured questions were used to examine the current estimate follow-up process.

Several important patterns emerged.

There was no defined follow-up sequence.

After an estimate was sent, the normal process was essentially:

Send Estimate → Wait for Customer → Estimator Remembers to Follow Up

The first follow-up generally happened within 4–7 days.

But there was:

- no standard number of follow-up attempts;
- no standard follow-up schedule;
- no consistent sequence;
- no standardized messaging.

Employees created their own messages and decided how to proceed individually.

Follow-up was regularly delayed.

The company reported estimates going more than one week without follow-up:

Several times per week

The reasons reported included:

- employees getting busy;
- follow-ups being forgotten;
- no reminders;
- no standard process.

Responsibility existed, but accountability was incomplete.

The person who prepared the estimate was generally responsible for following up.

However, an estimate was only **usually** assigned to a follow-up person.

That created a gap between general responsibility and reliable operational ownership.

Management visibility required manual effort.

The company could identify estimates waiting for customer decisions, but doing so required some manual work.

There was no automatic alert when an estimate had been inactive too long.

That meant the system did not reliably bring exceptions to someone's attention.

Lost-opportunity information was weak.

Customer objections were recorded only sometimes.

Reasons for lost estimates were recorded rarely.

Common explanations included:

- price;
- customer stopped responding;
- customer selected another contractor;
- unknown.

Without consistent outcome data, management had limited ability to understand why estimates were actually being lost.

3. The Current-State Workflow

The existing process could be summarized as:

ESTIMATE SENT

↓

WAIT FOR CUSTOMER RESPONSE

↓

ESTIMATOR EXPECTED TO OWN FOLLOW-UP

↓

FIRST FOLLOW-UP GENERALLY 4–7 DAYS

↓

ADDITIONAL FOLLOW-UP VARIABLE

↓

CUSTOMER DECISION

↓

OUTCOME RECORDING INCONSISTENT

The process was not completely absent.

Employees knew follow-up was part of their responsibility.

The problem was that the business lacked the controls necessary to make that responsibility consistently executable.

4. Root-Cause Diagnosis

After separating symptoms from causes, the primary diagnosis was:

Primary Diagnosis: No Defined Estimate Follow-Up Process

Confidence: High

The company had not established a complete operating standard defining:

- when follow-up should occur;
- how many attempts should be made;
- what communication should be used;
- what happens when the customer doesn't respond;
- what happens when follow-up becomes overdue;
- when an opportunity should remain active;
- when an estimate should be closed;
- what information should be recorded.

Because those rules did not exist, execution depended heavily on employee memory and available attention.

That created the pattern:

No Defined Process

↓

No Consistent Schedule, Attempt Count or Messaging

↓

Follow-Up Depends on Employee Memory

↓

Employees Get Busy / Follow-Up Is Forgotten

↓

Estimates Go More Than a Week Without Follow-Up

↓

Potential Sales Opportunities Receive Inconsistent Attention

5. Secondary Diagnoses

Weak Follow-Up Control & Reminder Mechanism

Confidence: High

The company reported no inactivity alerts and no reliable reminder structure.

Identifying estimates awaiting a decision required manual work.

This meant that even when employees intended to follow up, the operating system did little to protect against forgotten work.

Incomplete Estimate Outcome Tracking

Confidence: Moderate

Objections were recorded inconsistently and loss reasons were rarely recorded.

This was not considered the main reason follow-up failed.

However, it reduced management's ability to understand:

Why are we actually losing estimates?

That information matters when evaluating sales performance later.

6. What We Did Not Blame

An important part of the diagnosis was identifying explanations that the evidence did **not** support.

Employee Performance

There was insufficient evidence to conclude that the estimators were poor performers.

The process itself lacked structure and controls.

Staffing

Employees getting busy was relevant, but there was not enough evidence to conclude that Summit needed more staff.

Technology

The evidence did not establish that Jobber itself was the problem.

The issue could involve configuration, usage, process design, or a combination.

The Owner

There was insufficient evidence to conclude that excessive owner dependency was causing this particular problem.

This matters because operational consulting should address the demonstrated cause rather than defaulting to hiring, replacing software, blaming employees, or automating everything.

7. Establishing the BEFORE Baseline

The next step was to quantify what could actually be supported.

Estimate Volume

Client Estimate: Approximately 20 estimates per week.

Estimate Conversion

Client Estimate: Approximately 35%.

Estimated Jobs Won Per Week

Calculated:

20 estimates × 35% = approximately **7 jobs per week**

Estimates Not Converting

Calculated:

20 estimates − 7 estimated wins = approximately **13 estimates per week that do not convert**

This does **not** mean 13 estimates are being lost because of poor follow-up.

Customers may decline for many legitimate reasons.

Annualized Estimate Volume

Assuming the reported weekly volume remained typical throughout the year:

20 × 52 = approximately **1,040 estimates per year**

This is an annualized projection, not verified annual system data.

Follow-Up Compliance

UNKNOWN — MUST MEASURE

The company could report that follow-up was missed, but it did not have a reliable measured compliance rate.

Time to First Follow-Up

Client Reported: Generally 4–7 days.

Estimates Going More Than One Week Without Follow-Up

Client Reported: Several per week.

Lost-Reason Completion

Client Reported: Rarely recorded.

8. The Financial Context

At an estimated:

364 won jobs annually

and approximately:

$16,000 average revenue per won job

the estimated volume represented approximately:

$5.824 million in annualized gross revenue associated with the current estimate volume and estimated conversion rate.

This number is useful for understanding the scale of the sales pipeline.

It is **not** a claim that inconsistent follow-up was costing the company millions of dollars.

The actual revenue being lost specifically because of inconsistent follow-up was:

UNKNOWN

Without evidence connecting missed follow-ups to lost jobs, assigning a dollar amount would create false precision.

9. The Solution Design

The recommended solution was:

Standardized Estimate Follow-Up System

The objective was:

> Create a consistent process that follows every active estimate until a defined outcome is reached, reduces dependence on employee memory and manual monitoring, and preserves human involvement where sales judgment and customer relationships matter.

The solution was intentionally designed around Summit's existing tools before considering additional software.

No new CRM was recommended.

No AI system was required.

No major integration project was proposed.

10. The Core Operating Rule

The redesigned system revolves around one rule:

ACTIVE ESTIMATE = OWNER + NEXT ACTION

An estimate should not remain active unless the business can answer:

Who owns it?

and

What happens next?

This creates accountability without requiring management to manually chase every estimator.

11. Proposed Future-State Workflow

The redesigned process is:

ESTIMATE SENT

↓

ASSIGN OWNER

↓

ESTABLISH NEXT ACTION

↓

FOLLOW UP

↓

RECORD CUSTOMER RESPONSE

↓

ESTABLISH NEXT ACTION

↓

CONTINUE / ESCALATE / CLOSE

↓

WON / LOST / NURTURE

↓

RECORD OUTCOME

↓

MEASURE PERFORMANCE

The estimator who prepares the estimate remains the primary owner unless responsibility is formally reassigned.

12. Proposed Follow-Up Cadence

A standardized working cadence was designed:

Day 0

Estimate sent.

Owner established.

Next action established.

Day 2

Confirm receipt and ask whether the customer has questions.

Day 5

Personal follow-up regarding scope, questions, concerns, or timing.

Day 10

Decision-status follow-up.

Determine whether unresolved concerns exist.

Day 21

Final follow-up within the standard active sequence.

After that point, the estimate should move into a defined condition:

Won

Lost

Nurture / Future Decision

or

Active with a legitimate specific next action

The cadence is a proposed business rule for this hypothetical engagement and would require client approval before live implementation.

13. Preserve Human Judgment

Standardizing the process does not mean automating every customer interaction.

The system should handle predictable process control.

System Responsibility

Where supported and configured:

- maintain ownership;
- track next actions;
- provide reminders;
- surface overdue activity;
- maintain status information;
- support reporting.

Estimator Responsibility

Humans remain responsible for:

- customer conversations;
- questions;
- objections;
- negotiation;
- pricing discussions;
- unusual circumstances;
- determining appropriate customer-specific next actions;
- final sales judgment.

For example, if a customer says:

“My insurance adjuster is coming Thursday. Call me Friday.”

the estimator should not blindly send a generic scheduled message on Wednesday.

The appropriate next action becomes:

Call Friday.

The process creates control without removing judgment.

14. Proposed Status Structure

The process uses a small number of meaningful operational states.

Follow-Up Active

Estimate is awaiting a customer decision.

Required: Owner + Next Action

Customer Responded

Customer has engaged, but no final decision exists.

Required: Owner + Next Action

Nurture / Future Decision

Customer has legitimately postponed the decision.

Required: Owner + Future Action Date

Won

Customer accepted the estimate.

Routine estimate follow-up ends.

Lost

Opportunity is no longer active.

A loss reason should be recorded.

15. Lost-Estimate Reasons

The proposed starting categories are:

- Price
- Customer stopped responding
- Chose another contractor
- Other
- Unknown

“Unknown” is intentionally available.

Employees should record what they actually know rather than inventing a reason to complete a field.

16. Follow-Up Communication Templates

Standard templates give employees a consistent starting point without preventing personalization.

Day 2 — Receipt & Questions

Hi [First Name], this is [Estimator Name] with Summit Home Exteriors. I wanted to make sure you received the estimate for your [project type]. If you have any questions about the scope, options, or next steps, I'm happy to help. Just reply here or give me a call when it's convenient.

Day 5 — Check-In

Hi [First Name], just checking in on the estimate we sent for your [project type]. I wanted to see if any questions came up as you've been reviewing it. If there's anything you'd like me to clarify or go over with you, let me know.

Day 10 — Decision Support

Hi [First Name], I wanted to follow up on your [project type] estimate and see where things stand. If you're still considering the project, I'm happy to answer any questions or discuss anything that's holding up the decision. Let me know how I can help.

Day 21 — Final Active Follow-Up

Hi [First Name], I'm following up once more regarding your [project type] estimate. If you're still planning the project, we'd be glad to help when you're ready. If your plans have changed, that's completely fine too—just let me know so I can update our records. Thanks, [Estimator Name].

17. Exception Handling

A reliable process also needs to work when things don't go according to plan.

Employee Forgets a Follow-Up

The overdue action should become visible.

The estimator completes the action or records the correct next action.

If it remains unresolved beyond the approved tolerance, management reviews it.

Customer Doesn't Respond

Continue the approved sequence.

Do not automatically mark an opportunity Lost after one unanswered message.

Employee Is Absent

Active estimates with actions due during the absence should be transferred to the designated backup.

Customer Has an Objection

The estimator handles the objection.

Technology should not make the sales decision.

Customer Wants to Wait

Record a future next-action date.

Do not allow the opportunity to disappear simply because it no longer fits the standard cadence.

System Is Temporarily Unavailable

Preserve the required customer/action information and update the operational system once access is restored.

18. Management by Exception

The redesigned system is intended to make management oversight simpler.

A manager should not have to manually reconstruct the entire estimate pipeline every day.

Management should be able to answer:

Which estimates are active?

Who owns them?

What happens next?

Which actions are overdue?

Which opportunities were won?

Which were lost?

Why were they lost?

Management can then focus attention on exceptions instead of micromanaging every normal estimate.

19. The Employee Standard

Before an estimator finishes working an active estimate, they should be able to confirm:

- the correct owner is assigned;
- the status is accurate;
- required follow-up has been completed;
- important customer information is recorded;
- a next action exists;

- the next action has a due date.

Before closing an estimate:

- final outcome is recorded;
- Lost estimates have a loss reason;
- Nurture opportunities have a future date;
- unnecessary follow-up actions are closed.

20. Technology Recommendation

The solution hierarchy deliberately started with the simplest interventions:

ELIMINATE → CLARIFY → STANDARDIZE → CONFIGURE EXISTING SOFTWARE → INTEGRATE → AUTOMATE → APPLY AI → ADD SOFTWARE

For Summit, the recommended path stopped well before the final levels.

Keep

- Jobber
- QuickBooks
- Gmail
- Google Calendar

Clarify

Follow-up ownership and accountability.

Standardize

Cadence, statuses, next actions, outcome tracking, communications, and exception handling.

Configure

Use Jobber as the primary operational system where verified native capabilities support the process.

Automate

Use only appropriate rules-based reminders and controls where supported.

AI

Not required.

Additional Software

Not justified based on the available evidence.

The goal was not to add more technology.

The goal was to make the existing business system work better.

21. What Would Need to Be Configured

The implementation specification called for verification and configuration of:

- estimate ownership;
- next-action tracking;
- follow-up reminders;
- overdue visibility;
- operational statuses;
- loss-reason capture;
- communication templates;
- activity timestamps;
- outcome reporting;
- measurement data.

The exact configuration would depend on the capabilities available in the client's actual Jobber environment.

A specification is not the same as implementation.

Until the configuration is completed and verified, these components should be considered:

READY TO CONFIGURE

—not—

BUILT AND WORKING

22. Testing Plan

Before employee rollout, the actual system should be tested end-to-end.

Tests should include:

Normal Workflow

Send estimate → assign owner → establish next action → complete follow-ups → record outcome.

Customer Response

Verify that a legitimate customer-specific next action can replace the default cadence.

Overdue Follow-Up

Allow a test action to become overdue and verify the correct exception behavior.

Employee Absence

Verify an active estimate can be reassigned without losing context or next-action information.

Won Estimate

Verify routine follow-up stops correctly.

Lost Estimate

Verify loss reason is captured.

Nurture Opportunity

Verify a future action remains visible.

Communications

Verify correct recipient, personalization, timing, and absence of unresolved placeholders.

Measurement

Verify the system captures the data required for future Before/After comparison.

Written instructions alone would not qualify as test evidence.

23. Employee Training Plan

Once the system passes testing, estimators would receive approximately 30 minutes of practical role-based training.

Training would cover:

Why the process changed

When the process starts

What the estimator owns

What the system handles

How the follow-up sequence works

How customer-specific situations change the next action

How to classify Won, Lost, and Nurture opportunities

How to handle overdue items

When to escalate

Employees would then practice realistic scenarios.

Training would not be considered complete simply because employees attended.

They would need to demonstrate that they can correctly operate the process.

24. What Would Be Measured

The original baseline established the metrics that should eventually be compared with actual post-implementation performance.

1. Follow-Up Compliance Rate

Before: Unknown — must measure

After: Percentage of eligible estimates receiving required follow-up.

2. Time to First Follow-Up

Before: Generally 4–7 days, client reported.

After: Actual measured time from estimate sent to first follow-up.

3. Estimate Conversion

Before: Approximately 35%, client estimate.

After: Actual conversion using the same definition and comparable population.

4. Lost-Reason Completion

Before: Rarely recorded.

After: Percentage of Lost estimates containing a recorded reason.

5. Manual Management Time

Before: Unknown — must measure.

After: Actual estimator/management time required to manage estimate follow-up.

25. What We Would Not Claim

This case intentionally does not say:

“Conversion increased 20%.”

“The company recovered $500,000.”

“The system saved 10 employee hours every week.”

“ROI was 15X.”

None of those results were measured.

Potential benefit is not actual benefit.

Likewise, if employees eventually recover administrative time, that represents **labor capacity recovered** unless payroll actually decreases.

And if customers make decisions faster, improved revenue timing or cash-flow timing should not automatically be represented as new revenue.

26. Implementation Status of This Hypothetical

This case study demonstrates the consulting process and deliverables rather than claiming a completed real-world transformation.

Analysis

Completed

Root-Cause Diagnosis

Completed

Baseline

Completed

Solution Design

Completed

Build Specification & Assets

Created

Software Configuration

Not verified as implemented

SOP / Documentation

Created

Testing

Test plan created; actual system not tested

Training

Training materials created; training not delivered

Competency

Not verified

Measurement

No post-implementation data

Final Business Result

INSUFFICIENT DATA

That is intentional.

A system should not be declared successful simply because the recommendation sounds good or the documentation looks complete.

27. What This Engagement Demonstrates

This hypothetical case illustrates an important difference between **giving business advice** and **building an operational system**.

The surface-level problem was:

> “Our estimators aren't following up consistently.”

It would have been easy to immediately recommend automated emails, AI sales agents, another CRM, or simply tell employees to follow up more.

Instead, the process worked backward from the evidence.

We found that the business had:

general responsibility without a complete process;

customer follow-up without a consistent cadence;

software without sufficient process control;

sales activity without reliable outcome information;

and

management visibility that still required manual effort.

The solution therefore focused first on ownership, standardization, next-action control, exception handling, and measurement.

Technology supports that system.

Technology is not the system.

28. The Contractor Systems Approach

Our methodology moves one operational problem through a structured sequence:

PROBLEM

↓

EVIDENCE

↓

ROOT CAUSE

↓

BASELINE

↓

SOLUTION

↓

WORKING SYSTEM

↓

DOCUMENTED PROCESS

↓

TESTED PROCESS

↓

TRAINED PEOPLE

↓

MEASURABLE RESULT

The goal is not to install as much technology as possible.

The goal is to answer:

> **Did we actually make the business better, and can we prove it?**

For Summit Home Exteriors, the hypothetical engagement demonstrates what the system would look like and what would need to happen before results could responsibly be claimed.

Key Takeaway

Summit's estimate follow-up problem did not require a complicated technology project.

It required a reliable operating system.

The recommended change was built around a simple principle:

Every active estimate needs an owner and a next action.

That one rule is supported by defined timing, clear responsibility, standardized communication, exception handling, outcome tracking, management visibility, employee training, and measurable performance.

That's the difference between telling a contractor to:

“Follow up more.”

and building a system designed to make consistent follow-up part of how the business operates.

About This Case Study

This case study is a hypothetical example created to demonstrate the Contractor Systems Group consulting process.

Summit Home Exteriors is fictional. The company profile, operational data, employee count, revenue figures, diagnostic responses, and circumstances are illustrative.

No actual client outcome, revenue increase, conversion improvement, cost savings, or ROI is represented.

The example demonstrates how an operational problem can move from:

symptom → evidence → diagnosis → baseline → practical system design → implementation plan → documentation → testing → training → measurement.

We don't sell AI. We fix business problems.