RFP

2026 EDITION

CONTRACTOR PLAYBOOK 1 OF 6

Speed to Lead

Winning the first five minutes





WHY IT MATTERS

Speed to Lead

A homeowner who fills in a pergola form at 8pm is excited right then. By the next afternoon they've often asked two other contractors, and the lead gets called "bad".

Most "bad leads" just went cold. The fix isn't more leads, it's reaching the ones you already pay for while they still care.

THIS WEEK

Quick wins

Turn on instant alerts

Every new lead should ping your phone (WhatsApp or SMS) with the name, project, budget and timeline. If you find out from an email the next day, you're already late.

Set a 5-minute rule in business hours

Whoever is on the phone that day calls every new lead within 5 minutes. Write it on the wall. Say it in the Monday meeting.

Call, then text, then call again

No answer? Send a short text straight away ("Hi Maria, it's Mike from Coastal Outdoor, you asked about a pergola, is now a good time?"), then try again an hour later.

Save the lead's number before you dial

Name it "Maria – pergola – Coral Springs". When they call back, you answer by name.

GET THESE RIGHT

Core foundations

The contact rhythm

- Day 0: call within 5 minutes, text if no answer, call again in 1 hour.
- Day 1: call morning and late afternoon, one text.
- Day 2–3: one call a day, one email with 3 project photos.
- Day 5–7: last call and a "should I close your file?" text. These get replies.

The first call in 4 steps

- Thank them and confirm what they asked for.
- Ask about the project: what, where, when, rough budget.
- Book the site visit on the call, with two time options, not "when suits you?".
- Confirm by text with the date, time and your name.

After hours

- Your AI assistant replies within a minute, asks your questions and collects their best times.
- First thing next morning, the team calls everyone who came in overnight, oldest first.

Track it

- In your CRM, look at the time from "new lead" to "first call" every week.
- Move every lead to the right stage the same day. A stale pipeline hides lost money.

IMPLEMENTATION

Your next steps

Next 30 days

- Agree who owns lead calls each day of the week, including Saturday.
- Write your first-call script on one page and practise it twice with your team.
- Check last month's leads: how many were never reached? That's your baseline.

Next 90 days and beyond

- Get your average time-to-first-call under 10 minutes in business hours.
- Review 5 recorded first calls a month in your sales review.
- If no one can reliably answer, plan for a setter (see Playbook 6).

FILL THIS IN

Your plan

Who calls new leads on weekdays?

Who calls on Saturdays?

Our time-to-first-call target:

Leads never reached last month:

Bring this page to your monthly coaching call with Sam. We'll check progress and set the next steps together.