

A ten-minute estimate review

Pick 20 open estimates. Check three things: one owner, one next action, and one next-contact date.

1. Start with the open work

Export the estimates you are still trying to sell. In ServiceTitan, Housecall Pro or Jobber, use the open or unsold estimates list; from a paper estimate book, use the carbon copies. Include the estimate number, customer, amount, date given and the tech. Keep sold, declined and deliberately parked work separate.

2. Put a person and a date on each one

For each open estimate, name one person in the office responsible for the next step, not just the tech who wrote it. Write the action in plain English, such as answer the financing question or confirm which system they chose. Give it a real date.

3. Review exceptions first

Start with missing owners, missing next steps and overdue dates. Then look at homeowners who replied and haven't heard back, the largest dollar amounts, and anything older than 14 days. Check the reply before sending another message.

A follow-up your team can adapt

Hi [name],

Is [estimate / job] still on your list? If anything changed, like timing, budget or which option you want, let me know and I will update the estimate.

[Your name]

Use the worksheet

Open syndesi-estimate-check-worksheet.xlsx. Enter up to 100 estimates in the amber columns. Filter Review result to Action needed. Formula columns identify gaps; your team decides what to do next.

What to look at next week

Count how many open estimates had no owner or next step, how many were overdue, and how many homeowners replied without an answer. Compare the same measures next week. An overdue estimate is not automatically a lost job.

Use and adapt this. No meeting or purchase is required.

If you want help fitting it to the systems you already use, reply to Peter at peter@syndesi.io.