

LeadLeak Audit Checklist

A 10-minute self-check for HVAC, plumbing, electrical, roofing and other service businesses. Find where calls, inquiries and estimates slip through before you spend another dollar on leads.

How to use it: answer each line honestly for the last 30 days. Every "No" is a possible leak. Count your "No" answers per section at the end. The section with the most is where to start.

1 Missed calls

- | | |
|--|----------|
| ☐ Every call during business hours is answered by a person or returned within 1 hour. | Yes / No |
| ☐ After-hours callers get a voicemail that says when they'll hear back. | Yes / No |
| ☐ Missed calls get an automatic or same-day text back. | Yes / No |
| ☐ Someone checks voicemail at least twice a day. | Yes / No |
| ☐ We know roughly how many calls we missed last week. | Yes / No |

2 New inquiries (web, email, ads, directories)

- | | |
|--|----------|
| ☐ Website form submissions go to a phone or inbox someone checks daily. | Yes / No |
| ☐ Every new inquiry gets a reply the same business day. | Yes / No |
| ☐ Messages from Google, Yelp, Angi, Facebook and similar platforms are checked daily. | Yes / No |
| ☐ We ask every new customer how they found us, and write it down. | Yes / No |
| ☐ Our license number and phone number are on the website and estimates (Nevada requires the license number on advertising). | Yes / No |

3 Estimates

- | | |
|--|----------|
| ☐ Estimates go out within 24 hours of the site visit. | Yes / No |
| ☐ Every estimate sent is logged in one list (sheet, CRM or app), not just in email. | Yes / No |
| ☐ The list shows the date sent, amount and next follow-up date. | Yes / No |
| ☐ We confirm the customer received the estimate the same day. | Yes / No |
| ☐ Estimates include clear options, timing and warranty, so customers don't need to call to ask. | Yes / No |

4 Follow-up

- | | |
|---|----------|
| ☐ Every open estimate gets at least 3 follow-ups over 2 weeks. | Yes / No |
| ☐ We have ready-to-send follow-up texts and emails (not written from scratch each time). | Yes / No |
| ☐ Someone owns follow-up and works the list on a schedule. | Yes / No |
| ☐ We send a polite close-out message instead of letting estimates go silent. | Yes / No |
| ☐ Opt-out requests ("stop", "don't text me") are honored right away. | Yes / No |

5 Your numbers

- | | |
|---|----------|
| ☐ We know how many inquiries we got last month. | Yes / No |
| ☐ We know how many estimates we sent last month. | Yes / No |
| ☐ We know our close rate (jobs won ÷ estimates sent). | Yes / No |
| ☐ We know our average job value. | Yes / No |
| ☐ We contact past customers at least once a year (tune-ups, inspections, check-ins). | Yes / No |

Your score

Missed calls

No's: ____

Inquiries

No's: ____

Estimates

No's: ____

Follow-up

No's: ____

Numbers

No's: ____

MY BIGGEST LEAK IS

ESTIMATES SENT LAST MONTH

ONE FIX I'LL MAKE THIS WEEK

JOBS WON FROM THEM

CLOSE RATE (WON ÷ SENT)

Next step

Read the free guide "**How to follow up on an estimate: the 7-day playbook**" at buaflow.com/blog, then see the LeadLeak 7-Day Lead Recovery System at buaflow.com/leadleak.