

THE RECURRING WORK AUTOMATION REMOVES

What we take off your plate.

Home Services

Every business has a set of tasks that repeat forever. None of them are hard. All of them have to happen. And every one competes with the work that actually earns money.

About 27% of inbound calls to home-services businesses go unanswered and 25 to 40% arrive after hours, while the owner pays \$50 to \$230 for every lead that rings. Then two-thirds of estimates die without a third touch, even though 30 to 40% of the not-today buyers purchase within 30 days from whoever calls first. The office manager makes the first call; the fifth through seventh touches, which is where the response comes from, never happen.

BY INDUSTRY · HOME SERVICES

The Unsold Estimate & Season Engine

Rehash, seasonal sweeps and the maintenance base, Reg Z-clean

RECURRING TASK	HOW OFTEN	AUTOMATE?	WHAT CHANGES
Call the new lead back before the other guy does	Every lead	Full	Text and email in under 60 seconds, round-robin with a claim window, missed-call text-back on the 27% that ring out.
Estimate follow-up (did they get the quote?)	Days 2-7	Full	A 7-touch sequence starting day 2 replaces the rep's memory.
Unsold quotes from last quarter	Monthly sweep	Full	Aged-estimate re-activation runs on a calendar, 30/60/90-day and seasonal.
Sending the contract and chasing the signature	Per sold job	Partial	E-sign chase with a live checklist; cancel notice and disclosures templated in; a human still reviews scope.
Collecting the deposit and progress payments	Per milestone	Full	Invoice and payment link at each milestone with reminders until paid.
Financing turn-downs	Per financed job	Partial	Decline triggers a tagged lane instead of the deal dying silently.
Permit chase	Per job	Partial	Alerts when a permit stage stalls; the portal submission stays manual.
Job-site photos to the homeowner	Daily during install	Partial	Crew uploads; the homeowner gets a same-day update.
Change orders	Ad hoc	Partial	Form to e-sign to invoice update in one flow; owner approval preserved.
Seasonal tune-up reminders and agreement renewals	Twice a year	Full	Campaigns launch from the database in late August and February.
Warranty registration	Per install	Partial	Serial-number capture task with reminders until registered.
Review asks after the job	Per job	Full	Request at completion with a second ask if no click.
Insurance claim paperwork chase (storm roofing)	Per claim	Partial	Adjuster reminders, supplement tasks and homeowner updates; scope negotiation stays human.
Weekly where-are-we numbers	Weekly	Full	The owner's report replaces the Monday whiteboard.
Typical reclaim	8-12 hours a week — mostly the estimate follow-up, the paperwork chase and the seasonal campaigns nobody had time to send		

THE SEAT THIS DEFERS

A second CSR is \$60,000 to \$75,000 a year fully loaded

Payscale via ServiceTitan puts a home-services CSR at \$45,500 entry to \$58,900 senior; a dispatcher \$49,000 to \$63,900. Growth is \$14,364 a year recurring. The pitch is not fire your office manager. It is don't hire the second one, and stop paying a setter to leave voicemails.

WHATEVER THE INDUSTRY

The work that stops being yours.

Not features. Tasks — the ones currently done by you, done badly by someone else, or not done at all.

Every new lead

- Answered within seconds by text and email, day or night
- Assigned to the right person automatically
- Every missed call texted back
- The quiet ones chased on a schedule that doesn't annoy them
- The appointment booked without a phone-tag loop

Your existing list

- Old leads re-activated after being written off
- Anyone who re-engages detected and routed to a human
- A long-term nurture running in the background
- Unsubscribes and bounces handled automatically
- The list kept clean and deliverable

Clients in progress

- Onboarding sequence and document collection
- Status updates so nobody has to ask
- Invoices and payment links
- Review requests at the right moment
- Referral asks after a win

Partners and referral sources

- Tagged links so every referral is credited automatically
- Printable materials for their counter or desk
- Monthly statements sent without you touching them
- Recruitment outreach to bring on more partners

YOU, ON MONDAY MORNING

One email with the numbers that matter: what came in and from where, what closed, what stalled, how the campaigns did, which partners sent business, and what got built or fixed that week. Plus a dashboard you can open on your phone. Written for an owner, not a technician.