THE LEAD-TO-MARGIN PLAYBOOK

Ten places profit slips away between the first call and the final payment.

And the first three fixes for each one. For owners who quote or bid every job and do $1M to $25M a year.



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You probably don't need more leads.

You need more of the leads you already pay for to turn into signed, profitable work. Every job you sell goes through the same eight steps, from the first call to the final payment, and two habits hold them together: how much runs through you, and whether you trust your numbers. Each one loses a little. Fix the weakest few and the gains stack up.

HOW TO USE THIS PLAYBOOK

1. Take the free Profit Snapshot (ten questions, about two minutes) or score yourself with the questions on each page.
2. Pick your three weakest areas. Ignore the rest for now.
3. Use the 30-day plan near the back to fix one area at a time.

THE TEN AREAS

1	Know which paid leads make you money (Lead sources)	p. 4
2	Answer every lead while they're still looking (Answering)	p. 5
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Small fixes add up to real money.

Here's an example business: 100 leads a month, 40% get a quote, 30% of quotes close, $10,000 average job, 30% kept after materials and labor. Use the calculator on the website to run your own numbers.

EACH MONTH

100 leads → 40 quotes → 12 jobs



ONE SMALL IMPROVEMENT, WORTH THIS MUCH IN A YEAR

If...	Extra profit per year
You close 40% of your quotes, instead of 30%	**+$144,000**
50% of your leads get a quote, instead of 40%	**+$108,000**
You buy 20% more leads (after paying for them)	**+$74,400**
Your average job is 10% bigger	**+$43,200**
You stop giving away 3% in discounts	**+$43,200**

Your biggest lever: **you close 40% of your quotes, instead of 30%**, worth about $144,000 a year. It uses leads you already pay for.

Inputs: 100 leads a month, 40% of leads get a quote, 30% of quotes close, $10,000 average job, 30% kept after materials and labor, $50 per lead. Profit means what you keep from each job minus what you pay for leads. Each line is figured on its own.

01 Know which paid leads make you money

Lead sources: Can you see how many signed jobs each lead source brought in last month?

If you pay for leads, every source has a real cost per signed job, and it can vary a lot from source to source. Most owners see cost per lead. Few see cost per signed job, so the budget follows the slickest report.

31% of homeowners say online reviews are the top thing they look for in a contractor.[1]

Only 4% of consumers never read online reviews, and 89% expect the business to respond.[2]

Pro tip: track it automatically. Don't rely on "How did you hear about us?" alone. Capture campaign details (UTM tags) and the ad click ID (gclid, fbclid) automatically on every form and tracked call. Then send signed jobs back to Google and Meta, so the platforms optimize for real sales, not form fills.[3]

WARNING SIGNS

- Your marketing reports show clicks or cost per lead, not signed jobs.
- You can't say which source brought in last month's biggest job.
- Half your leads are tagged "website" or "other."

HOW TO MEASURE IT

Cost per signed job = what the source cost ÷ jobs signed from that source

Tag the source on every lead and every signed job. Each month, divide what each source cost by the jobs it signed.

FIRST THREE FIXES

1. **Make lead source automatic, not optional.** Capture source and campaign on every form and tracked call. Keep a required source field as the backup for phone and walk-in leads.
2. **Report cost per signed job, not cost per lead.** Once a month, list each source with cost, leads, quotes, signed jobs and profit. Move money from the worst source to the best.
3. **Put proof in front of every paid lead.** Short video testimonials and reviews from real customers, sent right after the quote and used in your ads. For a stranger, it's the next best thing to a referral.



From my own work: In my operating role, I built this: signed jobs flow from the CRM back to Google, Meta and Microsoft, so we judge ad spend on signed jobs instead of form fills.

Sources: [1] ArcSite with ResearchScape, 2022 [2] BrightLocal, 2025 [3] Google Ads Help

02 Answer every lead while they're still looking

Answering: How fast does a new lead get a live call or text from a real person, nights and weekends included?

A new lead is worth the most in the first few minutes. They just reached out, and they're probably reaching out to your competitors too. Every hour you wait, the odds of even getting them on the phone drop.

Calling a web lead within 5 minutes instead of 30 made contact 100 times more likely and qualifying the lead 21 times more likely.[4]

Only 52% of home-services calls are answered by a person. By trade, it ranges from 32% to 74%. (Call-tracking company data.)[5]

More than 55% of customers expect a reply within the hour, but only 20% of pros say they respond that fast. (Software company survey.)[6]

WARNING SIGNS

- Calls after 5 PM or on weekends go to voicemail and wait until Monday.
- Your office calls back "when they get to it."
- Nobody knows how many calls you miss each week.

HOW TO MEASURE IT

Response time = time of first real conversation − time the lead came in

Most CRMs and call-tracking tools log both. If yours doesn't, check 20 recent leads by hand.

FIRST THREE FIXES

1. **Set a call-back standard.** For example: every lead gets a call within 15 minutes during business hours. Write it down and make one person responsible.
2. **Text back every missed call.** An automatic text from a real person's name ("Sorry we missed you, can I call you at 8:30 tomorrow?") keeps the lead from calling the next company. Back it up with an answering service or an on-call rotation.
3. **Front-load your attempts.** Make several calls and texts in the first day, then back off. In the MIT study, extra dials after about 20 hours stopped helping.

Sources: [4] InsideSales.com and J. Oldroyd (MIT Sloan), 2007 [5] Invoca, 2026 [6] Jobber, 2026

03 Book visits with real buyers

Booking: Out of every 10 leads, how many get a quote from you?

Every visit costs your salesperson half a day. When it goes to someone who was never serious, or who isn't even home, good leads wait and buy from someone else. Booking isn't about turning people away. It's about filling the calendar with real buyers and making sure they show up.

Across 3,000+ trade shops, 42% of calls became a booked appointment. For shops with fewer than 5 techs it was 24%, and just 9% after 6 PM. (Software company data.)[7]

The odds of qualifying a lead drop more than 6 times within the first hour after it comes in.[4]

WARNING SIGNS

- Salespeople drive out to people who were never serious, or who aren't home.
- You find out the budget after the visit.
- Nobody confirms the appointment the day before.

HOW TO MEASURE IT

Booking rate = visits booked ÷ leads received

Also count no-shows and visits where the person wasn't ready to buy.

FIRST THREE FIXES

1. **Ask four questions when you book.** What's the project? When do you want it done? Have you set a budget range? Will everyone who decides be home for the visit?
2. **Confirm and remind.** A text the day before and the morning of, with the salesperson's name and photo. Fewer no-shows, warmer visits.
3. **Set a minimum for site visits.** Smaller jobs get a phone, photo or video estimate instead of a drive.



From my own work: In my operating role, changing how leads were screened and handed to the right salesperson doubled how many got a quote, from 20% to 40%.

04 Run the same strong visit every time

Sales visit: Out of every 10 quotes you give, how many sign?

The visit decides whether you win and how big the job is. When every salesperson pitches it their own way, your close rate depends on who showed up, not on how good your work is. And while your price sits on a desk, a competitor's is already on the kitchen table.

Contractors who showed four or more options raised their close rate by 10%, and premium equipment rose from 26% to 42% of sales.[8]

Most homeowners get more than one bid before deciding, and three is the most common number.[1]

28% of homeowners expect their quote the same day as the estimate visit.[1]

WARNING SIGNS

- Each salesperson has their own pitch and their own price sheet.
- Prices get emailed days after the visit.
- You close better than your team does.

HOW TO MEASURE IT

Close rate by salesperson = jobs signed ÷ visits run, for each person

Compare your salespeople side by side for the last 90 days. A big gap usually points to the visit, not the leads.

FIRST THREE FIXES

1. **Write down one visit, start to finish.** The questions to ask, what to show, how to present the price and how to handle the top five objections. Everyone runs the same play.
2. **Show three options every time.** Good, better, best, each with a price. Buyers pick a level instead of deciding yes or no.
3. **Leave a price on the table.** Price templates for your most common jobs, so the written price goes out before you leave or the same day.



From my own work: In my operating role, one consistent sales process and a weekly scorecard helped our close rate go from 8.5% to 12%.

05 Show a monthly payment, not just a total

Monthly payment: On big jobs, how often does your salesperson show the homeowner a monthly payment?

A big total is a hard yes. A monthly payment can be an easier one. When financing only comes up after the homeowner balks at the price, the job has already stalled, and some of those buyers quietly pick a smaller job or a cheaper company.

Offering financing raised close rates by 11%, and financed sales rose from 17% to 35% of sales.[8]

61% of homeowners use some form of credit to pay contracting bills.[1]

55% of homeowners expect flexible payment plans or financing.[9]

WARNING SIGNS

- Financing only comes up when the customer asks.
- You use one lender, and too many homeowners get turned down.
- Salespeople feel awkward bringing up payments.

HOW TO MEASURE IT

Financing offer rate = visits where a monthly payment was shown ÷ all visits

Also track how many applied, how many were approved and how many of those jobs closed.

FIRST THREE FIXES

1. **Pick two lenders.** A main lender and a second-look lender, so fewer homeowners get turned down.
2. **Show the payment next to every option.** Every option on the price sheet shows a total and a monthly payment. It becomes normal, not a rescue.
3. **Pre-qualify before the visit.** Send a quick pre-qualification link with the appointment reminder, so the salesperson knows the budget walking in.

Sources: [8] ACCA and Farmington Consulting, 2025 [1] ArcSite with ResearchScape, 2022 [9] Housecall Pro, 2025

06 Don't send the quote and hope

Follow-up: After a quote goes out, how many follow-ups does it get before you give up?

For most businesses that quote, the biggest pile of unclaimed money is quotes already sent. These people cared enough to get a price. Many just need a nudge, an answer to one question, or a reason to decide now.

Only 16% of roofing and exterior contractors follow up the same day on unsold estimates.[10]

There's no solid public study of follow-up after a quote. What holds up in practice: a written schedule with one owner per quote beats memory and good intentions.

For brand-new leads, extra call attempts after about 20 hours stopped helping. Persistence works best early.[4]

WARNING SIGNS

- Quotes go out and nobody calls unless the customer does.
- Each salesperson follows up their own way, or not at all.
- You can't pull a list of open quotes older than seven days.

HOW TO MEASURE IT

Close rate = signed jobs ÷ quotes sent

Also count open quotes with no follow-up in the last seven days.

FIRST THREE FIXES

1. **Use a simple schedule.** Day 0: send the quote and a text. Day 2: call. Day 5: text one useful detail. Day 10: call. Day 20: "Should I close your file?"
2. **Give every open quote one owner.** One name per quote, and it stays on their list until it's won or lost.
3. **Write down why you lose.** Use five fixed reasons: price, timing, chose someone else, project cancelled, no response. Review them monthly.



From my own work: In my operating role, clear sales stages, scorecards and weekly accountability helped move our close rate from 8.5% to 12%.

07 Make discounts a decision, not a habit

Discounts: Out of every 10 signed jobs, how many get a discount?

Every dollar of discount comes straight out of profit. The average remodeler keeps about 6 cents of net profit on every dollar, so a 3% discount gives away about half of it. When discounts aren't tracked, owners rarely see the total.

The average remodeler keeps 29.9% gross profit and 6.3% net profit.[11]

North American building-materials manufacturers kept only 54% of their planned 2023 price increases after discounts, rebates and promotions. Only 10% hit their full target.[12]

77% of homeowners report frustration with hidden costs, so clear pricing up front beats a surprise discount later.[9]

WARNING SIGNS

- Salespeople offer a discount before the customer asks for one.
- You find out about discounts after the job is done.
- "We have to match the other guy" comes up every week.

HOW TO MEASURE IT

Discount rate = total discounts ÷ total quoted price

For one month, record quoted price, final price and who approved it on every signed job.

FIRST THREE FIXES

1. **Write discount rules.** Example: up to 3% the salesperson decides, 3% to 7% needs a manager, above 7% needs you and a written reason.
2. **Trade, don't give.** Every discount gets something back: a larger deposit, a flexible start date, a referral or a review.
3. **Offer good, better, best.** Three options let a buyer pick a lower price without you cutting margin on the same work.

08 Run the sales team on numbers, not stories

Sales team: How often does each salesperson go over their own numbers with you or a manager?

When nobody tracks what happens after the lead, every lost job gets blamed on marketing and nothing gets fixed. Five numbers you trust, looked at every week with the same people, turn "the leads are bad" into a fix you can act on.

Only 35% of sales professionals completely trust their own organization's data.[13]

Salespeople spend about 70% of their time on work that isn't selling.[13]

Reaching customers and growing sales was the most common challenge small employers reported, followed by hiring and keeping staff.[14]

WARNING SIGNS

- Your salespeople say the leads are bad and want more of them.
- Sales meetings are about stories, not numbers.
- New salespeople learn by riding along with whoever is free.

HOW TO MEASURE IT

The five numbers, for each salesperson: leads, visits run, close rate, average job size and discounts given

Your CRM can usually show these. If it can't, start with a shared spreadsheet and fix the data at the source.

FIRST THREE FIXES

1. **Pick your five numbers.** Define each one in writing so everyone counts the same way, then show them for each salesperson.
2. **Hold a 30-minute weekly meeting.** Same day, same time. Numbers first, then the biggest open deals, then one fix for the week.
3. **Build a training plan for new hires.** A written first 30 days: what they learn, who they shadow and the numbers they own by week four.



From my own work: In my operating role, a structured hiring and onboarding plan cut the time for new salespeople to start selling from three months to nine weeks, and 9 in 10 new hires were still with us after 90 days, up from 5 in 10.

Sources: [13] Salesforce, 2024 [14] Federal Reserve Banks, 2026

09 Get paid, get reviewed, get referred

Paid & reviewed: Out of every 10 finished jobs, how many leave you a review?

Being busy and broke at the same time is common in businesses that sell jobs. Materials and labor go out before the customer pays. And a happy customer at the final walkthrough is your cheapest next lead, but only if someone asks.

The median small business holds about 27 days of cash.[15]

59% of small businesses have invoices more than 30 days overdue. Those waiting are owed $17,700 on average.[16]

96% of consumers are open to leaving a review, but only 29% wrote one in the past year.[2]

73% of homeowners would refer a pro after excellent service.[9]

WARNING SIGNS

- Final payments wait weeks on small punch-list items.
- Nobody asks happy customers for a review.
- Referrals happen by luck, not by habit.

HOW TO MEASURE IT

Days to cash = date of final payment − date signed

Also track the share of finished jobs that left a review and sent a referral.

FIRST THREE FIXES

1 **Collect a deposit and get paid at the walkthrough.** A deposit at signing, within your state's rules (California caps it at $1,000 or 10%, whichever is less), and the final payment by card or link at the final walkthrough.

2 **Ask for the review before you leave.** Send the review link by text while the customer is still standing in the finished job.

3 **Make referrals a habit.** Ask at the walkthrough and again 30 days later, and thank every referral.

Sources: [15] JPMorgan Chase Institute, 2016 [16] Intuit QuickBooks, 2026 [2] BrightLocal, 2025 [9] Housecall Pro, 2025 [17] California Business and Professions Code Section 7159.5. https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=BPC&sectionNum=7159.5

10 Get yourself out of every deal

Owner time: What share of jobs still need you to close the deal or approve the price?

If every big job, every discount and every tough customer comes back to you, your sales capacity is capped by your calendar. It also makes the business harder to step away from, and harder to sell one day.

Baby Boomer owners are the least likely generation to step back from day-to-day operations, according to the Exit Planning Institute.[18]

WARNING SIGNS

- You do estimates at night or on weekends.
- Sales slow down when you take a week off.
- Your team asks you before they decide anything.

HOW TO MEASURE IT

Owner-dependent sales = revenue from deals you closed or approved ÷ total revenue

Go through last quarter's signed jobs and mark the ones that needed you.

FIRST THREE FIXES

1. **Write down how you sell.** Your questions, your pricing logic and how you handle the top five objections, on two pages.
2. **Set approval limits.** Your team decides inside the limits. You only see what's outside them.
3. **Hire for the system, then train.** A written onboarding plan, a scorecard from week one, and a weekly check-in.

Sources: [18] Exit Planning Institute, 2025

Weekly scorecard

Fill this in every week, in a 30-minute meeting with whoever sells and schedules. Numbers first, then the three biggest open deals, then one fix for the week.

Number	Week 1	Week 2	Week 3	Week 4
Leads				
Quotes sent				
Close rate (signed ÷ quotes)				
Average job size				
Margin on signed work				
Backlog in weeks				
Open quotes older than 7 days				

MEETING AGENDA (30 MINUTES)

1. Numbers against last week (10 minutes)
2. Three biggest open quotes: what happens next and who owns it (10 minutes)
3. One fix for this week, with an owner and a due date (10 minutes)

Templates you can use tomorrow

QUOTE FOLLOW-UP SCHEDULE

Day	What to do
0	Send the quote. Text: "Just sent your quote. Any questions, call or text me here."
2	Call. Ask what questions came up and who else is deciding.
5	Text one useful detail: a photo of similar work, a review, or a scheduling update.
10	Call. Ask directly: "What would it take to move forward?"
20	"Should I close your file, or keep it open?" Then record the reason if lost.

DISCOUNT RULES (EXAMPLE)

Discount	Who can approve	What you get back
Up to 3%	Salesperson	Signed today, or a larger deposit
3% to 7%	Sales manager	Flexible start date, referral or review
Over 7%	Owner, with a written reason	Reviewed monthly

FOUR QUESTIONS BEFORE YOU QUOTE

1. What's the project, in your words?
2. When do you want it done?
3. Have you set a budget range?
4. Who else is part of the decision?

Your 30-day plan

Write your three weakest areas below. Fix one at a time, in this order.

Week 1

- [ ] Start the weekly scorecard. Fix area #1: first fix.
- [ ] Owner: _____ Due: _____

Week 2

- [ ] Area #1: second and third fixes. Area #2: first fix.
- [ ] Owner: _____ Due: _____

Week 3

- [ ] Area #2: remaining fixes. Area #3: first fix.
- [ ] Owner: _____ Due: _____

Week 4

- [ ] Area #3: remaining fixes. Compare the scorecard to week 1.
- [ ] Owner: _____ Due: _____

#	My weakest areas	First fix I'll make
1		
2		
3		

Want help with this?

Start with the free Profit Snapshot on my website. It scores your business in about two minutes and sends you a personal report like this one.

Free 15-minute walkthrough — **Free**

We'll go through your weakest three areas together. No pitch unless you ask for one. Book a time here, or email christian@leadtomargin.com.

Lead-to-Margin Diagnostic — **Fixed price, agreed up front**

Three weeks with your real numbers, including a look inside your ad accounts. Every problem gets a dollar figure, plus a 90-day plan, a walkthrough with your team and a check-in 30 days later.

90-Day Fix — **Three months, in person**

Side by side with your team for 90 days to put in the one or two changes worth the most.

Part-time VP of Sales & Marketing (2 spots) — **1 to 3 days a week**

I own marketing, sales, pricing and the handoffs to operations and cash, 1 to 3 days a week. The fee grows with days per week.

Add-on: paid ads, run by me — **Flat monthly fee**

I run your Google, Meta and Microsoft ads, with a monthly cost-per-signed-job report. You own the accounts.

Worth it, or you don't pay. When I walk you through what I found, you decide. If the Diagnostic wasn't worth every dollar to you, I refund all of it.



I'm Christian Nipper.

I started out quoting and closing jobs myself, as one of more than 30 reps. Since then I've helped hundreds of businesses put sales and marketing systems in place, built sales teams from the ground up for owners, and today I run sales and marketing for a building-products company, where revenue grew more than 50% in one year.

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Every statistic in this report was checked against the original source. Results labeled "from my own work" come from my in-house operating role, 2024 to 2025, and aren't a promise of results for your business.

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