

Module 6: Generate More Leads & Close Bigger Jobs

Summary

Improve growth outcomes through clearer messaging, consistent campaigns, and structured follow-up.

Sections & Action Items

Service-Specific Messaging

- Identify top converting services
- Refine messaging per service
- Align messaging with customer priorities

Co-Branded Campaigns

- Use supplier-backed campaigns
- Ensure consistent follow-up
- Track campaign performance

Follow-Up on Unsold Estimates

- Set follow-up reminders
- Track conversion by rep
- Standardize follow-up timing

Reflection Question

Where do good opportunities stall in your process?

Next Steps

1. Identify top-performing services
2. Improve one campaign
3. Audit follow-up consistency

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Module 6 Worksheet: Lead & Closing Execution Audit

1. Service-Specific Messaging Audit

Top 3 services generating leads:

1. _____

2. _____

3. _____

Which services convert best to jobs? _____

Is messaging tailored per service? ☐ Yes ☐ No

Where is messaging too generic? _____

Messaging Maturity Score (1–5): _____

1 = generic messaging | 5 = highly targeted and effective

2. Campaign & Follow-Up Consistency

Do you run structured campaigns? ☐ Yes ☐ No

Are follow-ups consistent after the first touch? ☐ Yes ☐ No

Where do prospects drop off? _____

Campaign Maturity Score (1–5): _____

1 = inconsistent outreach | 5 = structured, repeatable campaigns

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3. Unsold Estimate Follow-Up Audit

How are unsold estimates tracked? _____

Is follow-up automated or manual? _____

Where are opportunities being missed? _____

Follow-Up Maturity Score (1-5): _____

1 = no structure | 5 = consistent, system-driven follow-up

4. Conversion Friction Analysis

Where do deals stall most often? _____

What causes hesitation? (check all that apply):

☐ Unclear messaging

☐ Pricing confusion

☐ Slow follow-up

☐ Lack of trust / credibility

Top issue to fix this month: _____

5. 30-Day Growth Action Plan

1 Messaging improvement: _____

1 Campaign improvement: _____

1 Follow-up improvement: _____

Owner: _____

Deadline: _____

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