



A 10-minute checklist for missed calls, open quotes and after-hours admin

A free checklist from Suncoast AI Lab for home-service and trade businesses. No AI needed to use it. Tick what's true today, and the gaps show you what to fix first.

Speed matters. Jobber, which makes a popular scheduling and invoicing app for contractors, surveyed 1,050 home-service owners in December 2025. Over 55% said their customers expect a response within the hour ([Jobber's 2026 Home Service Trends Report](#)).

Missed calls

- ☐ I know how many calls I missed last week. (Check your phone app's call log.) Number: _____
- ☐ Every missed call gets a text back within _____ minutes, even when I'm on a job.
- ☐ The text is about their call, not a promotion. (The FCC says commercial texts need written consent. See the [FCC guide](#).)
- ☐ Regular customers get a text that uses their name. New callers get a short welcome and a way to book.
- ☐ My texting number is registered for business texting. (Ask your phone or texting provider.)
- ☐ Someone calling three times in five minutes gets one text, not three. (Test it.)
- ☐ STOP replies are honored right away.
- ☐ New callers get saved to my customer list so the next call is recognized.

Quotes

- ☐ I know how many quotes are open right now. Number: _____
- ☐ Every quote goes out within _____ of the visit or call.
- ☐ Every open quote gets a follow-up on day _____ and day _____.
- ☐ The follow-up says what the quote was for, so the customer doesn't have to dig for it.
- ☐ One person owns follow-ups: _____
- ☐ Won and lost quotes are marked, so I know my close rate.

After-hours admin

- ☐ Invoices go out the same day the job is done, not that night. (Most invoicing tools can send from your phone.)
- ☐ Unpaid invoices get an automatic reminder on day _____ and day _____. (Check your invoicing tool's settings.)
- ☐ Tomorrow's appointments get a confirmation text or email without me typing it.

- ☐ Estimates start from a saved template, so I fill in the job instead of writing from scratch.

Where AI can help, and where it shouldn't

- A plain template handles the first missed-call text. No AI needed.
- AI can draft a reply when the customer texts back, or a quote follow-up. **A person approves it before it sends.**
- Prices, schedules and promises stay with you. Never let AI guess at them.

What's one job worth?

Average job value: \$_____ × calls or quotes lost per month: _____ = \$_____ a month at stake. Compare that number to the cost of any tool before you buy it.

Sources checked Oct 19, 2026. This isn't legal advice. Want help setting it up? Call or text (314) 960-7198, or book a free 20-minute call at suncoastailab.com/call. We're independent and don't take vendor referral fees. Suncoast AI Lab