



The Painter's VA

The 7 Immediate Wins Guide

SOP 1

SPEED-TO-LEAD

(3–15 Minute Rule)

Contact Every New Lead in 15 Minutes

Faster contact = higher contact and close rates.

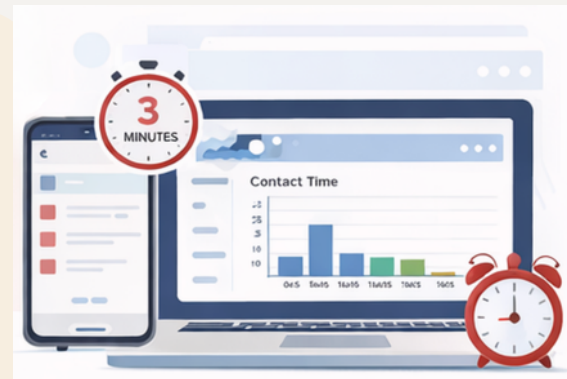


WHY IT MATTERS

Fast first contact drastically improves:

- Contact rate
- Win rate.

If owners or teams delay, leads cool and close rates fall.



STEPS

- Require first contact for every new inbound lead within 15 minutes (phone or SMS + email).
- Use a 2-step initial touch: SMS (if phone provided) → call. If no pick, leave a short voicemail and follow with email.
- Immediately log lead in CRM and set “Next Action” and owner.
- Track time-to-first-contact in CRM daily; automate alerts for >15 minutes.



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SCRIPTS / TEMPLATES

- **SMS (30 sec):**

Hi [First Name], Cody at [Company]. Thanks for requesting a quote, I'm calling now to confirm a few details so I can get your estimate together. What's the best time to reach you?

- **Voicemail (10-12 sec):**

Hi [First Name], Cody at [Company]. Sorry I missed you, I'll follow up by text. Looking forward to connecting.

Time to implement:

**1-2 hours
(CRM rule +
templates)**

Expected impact:

**Immediate
bump in
contact
rate; fewer
cold leads.**

Metrics to track:

- **Time-to-first-contact histogram**
- **Contact rate before/after**
- **Conversion lift**



SOP 2

ESTIMATE FOLLOW-UP CADENCE

The Money Sequence

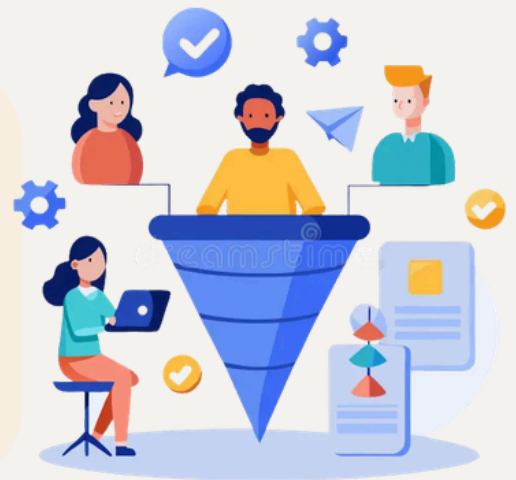
Estimate Follow-Up That Converts

A repeatable 4-step cadence to turn more estimates into jobs.



WHY IT MATTERS

Most estimates die because follow-up is inconsistent. A simple, disciplined cadence recovers a large share of “unsold” estimates.



STEPS

- Day 0 (send estimate): Email with estimate PDF + SMS confirming it's sent.
- Day 2: Call + text. If no answer, leave voicemail + text.
- Day 5: Value email — short case study or FAQ addressing common objections.
- Day 10: Final re-engage — short check with a time-limited opening or incentive (seasonal or schedule based).



SCRIPTS / TEMPLATES

- **Day 2 Call:**

Hey [First Name], this is [Your Name] with [Company]. I'm calling about the estimate I sent on [date] — did you have any questions or want to walk through options?

- **Day 5 Email Subject:**

A quick note about your estimate — options and next steps

- **Day 10 Final (text):**

Quick check — do you want to revisit your estimate? I have a few openings this month.

Time to implement:

**1–2 hours
(CRM rule +
templates)**

Expected impact:

**Converts
10–25%+ of
otherwise-
dead
estimates.**

Metrics to track:

- **Estimate-to-close rate**
- **Follow-up touch counts**
- **Revenue recovered**



SOP 3

SCHEDULING & CRM HYGIENE

Make Your Calendar Reliable

Fix double-books, missed confirmations, and stale leads.



WHY IT MATTERS

Reliable scheduling and clean CRM data reduce missed appointments and owner firefighting.



STEPS

- Standardize required CRM fields: phone, email, address, job size, lead source, next action, contact attempts.
- Add mandatory “Next Action” and “Owner” fields — every lead must have one.
- Automate confirmation + 24-hour reminder (text + email) for scheduled estimates.
- Weekly 15-minute CRM sweep for leads with no activity >7 days.



SCRIPTS / TEMPLATES

Hi [First Name], confirmed — we'll see you on [date/time] for your estimate at [address]. Reply YES to confirm.

Time to implement:

**2–4 hours
(CRM
config +
templates)**

Expected impact:

**Fewer missed
appointments;
improved
reliability and
follow-up
discipline.**

Metrics to track:

- **No-show rate**
- **Double-book incidents**
- **CRM lead aging**



SOP 4

DELEGATION ROADMAP

What to Hand Off First

Delegation Roadmap: Where to Start with a VA

Hand off repetitive admin that costs owner time and attention



WHY IT MATTERS

Delegating the right tasks first frees owner time and quickly improves consistency across operations.



STEPS

- Lead intake & speed-to-lead execution
- Appointment scheduling & confirmations
- Estimate follow-up and unsold-bid nurturing
- CRM maintenance & data entry
- Social media posting and job photo repurposing
- Basic invoice reminders / deposit collection



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HOW TO TRAIN QUICKLY

- Create a one-page SOP per task: expected outcome, step-by-step actions, scripts, and 2 examples.
- Shadow for two days, then let the VA run tasks while the owner audits weekly.

Time to implement:

**2–6 hours
per SOP;
start with
first three
items**

Expected impact:

**Frees owner
hours;
improves
consistency
and follow-up**

Metrics to track:

- **Owner admin hours/week**
- **Task completion rate**
- **Follow-up consistency.**



SOP 5

SOCIAL MEDIA EXECUTION

Batch & Repurpose

Social Media Without the Headache

Batch photos and let a VA keep jobs visible.



WHY IT MATTERS

Consistent social posting builds social proof but owner time is scarce. A simple batching system saves time and keeps profiles current.



STEPS

- Crew captures daily job photos (before/after); crew provides a one-line caption.
- VA batches 4 posts/week: 2 job photos, 1 tip, 1 review/testimonial.
- VA schedules posts in a simple tool (Later, Buffer) with location/tags and a CTA.
- Caption template: job + problem solved + CTA.



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SCRIPTS / TEMPLATES

Before → After on a [type of job] in [neighborhood].
Customer wanted [result]. We finished in [days]. Want
this look? Reply or book a free estimate.

Time to implement:

**30–60
minutes/week
after setup.**

Expected impact:

**Maintains
pipeline and
social proof
with minimal
owner time.**

Metrics to track:

- **Posts/week**
- **Engagement
rate**
- **Inbound from
social.**



SOP 6

30-MINUTE ADMIN AUDIT

Do This Week

30-Minute Admin Audit — Find Quick Wins

A fast diagnostic that shows exactly what to delegate first.



WHY IT MATTERS

A quick audit reveals the highest-leverage admin tasks and provides a one-page action list.



30-MINUTE CHECKLIST:

- Track owner/admin tasks for one typical day (or review calendar for the week); list tasks >15 minutes.
- Count incoming leads and measure time-to-first-contact for each.
- Pull last 10 estimates: how many had follow-up? how many closed?
- Review missed calls for the last 7 days and check follow-ups.
- Quick math: admin hours/week × owner hourly value = monthly admin cost; estimate delegable %.



QUICK FORMULA

- Admin hours/week × owner hourly value = monthly admin cost
- Delegable \$/month = monthly admin cost × % delegable

Time to implement:



Expected impact:

Reveals where to start; creates a prioritized action list.

Metrics to track:

- Admin hours/week
- Delegable \$/month
- Quick wins list.



SOP 7

MISSED-CALL RECOVERY & UNSOLD-BID REACTIVATION

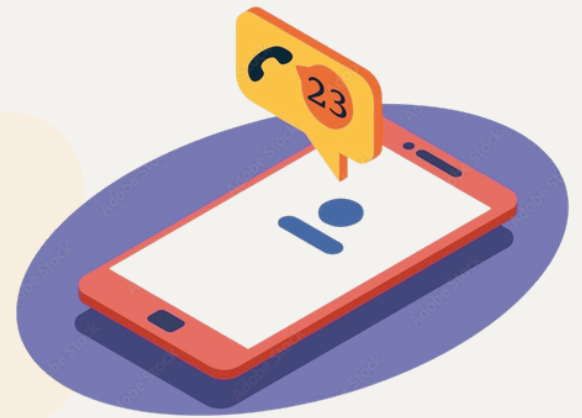
Recover Missed Calls & Reactivate Unsold Bids

Low-effort plays that recover easy revenue.



WHY IT MATTERS

Missed calls and unsold bids are often the easiest revenue to recover with simple processes.



STEPS

- Missed-call process: within 1 hour, send SMS + short voicemail + schedule 24-hour follow-up call; log in CRM.

Unsold bid re-engagement (3 touches):

- Day 2: Call/text — “Any questions?”
- Day 7: Email with value add (short case study/testimonial)
- Day 14: Final “quick check” with a small time-limited incentive or opening



SCRIPTS / TEMPLATES

- **Missed-call text:**

Hi [First Name], we missed your call earlier. This is [Name] at [Company] — when's a good time to call you back today?

- **Unsold re-engage email:**

Hi [First Name], just following up on your estimate. We had a similar job in [area] last month and the homeowner said [short benefit]. If you want to revisit any items I'm here — we also have a few openings this month.

Time to implement:

**1-2 hours
(templates +
CRM
automation)**

Expected impact:

**Recovers
revenue,
improves
estimate-to-
close rates.**

Metrics to track:

- **Recovered revenue**
- **Re-engagement rates**
- **Missed-call follow-up compliance.**

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