

First reply sheet

Pull the last 10 estimate requests that came in at night through your website form, email, or text line, and check the first message each person got back.

Five-minute check on your last 10 inquiries

1. Open the last 10 new inquiries that arrived at night through your website contact form, email inbox, or text line.
2. Next to each inquiry, write down the time it arrived and the time your first human or automated reply went out.
3. Read the exact wording of that first reply and check it against four points:
 - o Does it name the specific job or equipment the customer asked about?
 - o Does it ask one easy question that helps scope the visit?
 - o Does it state clearly who is writing on behalf of your shop?
 - o Does it avoid promising a callback window your trucks cannot keep?
4. Mark each reply that only says thank you for contacting us or promises that someone will reach out soon.

Inquiries to set aside first

Cross out these three groups before you score your 10 requests so you only grade real prospective jobs.

1. Spam form submissions and automated bot messages.
2. Vendor pitches, recruiting emails, and parts supplier notices.
3. Existing customers asking about an open job, warranty visit, or invoice already on your board.

Limits of this first reply check

This sheet checks the wording and timing of your first outbound message. It does not show lost bookings, lost revenue, or what a customer did next after reading your reply.

Weak and strong first reply example

Sample data. Made-up business.

Weak example

"Thanks for contacting us. Somebody will reach out soon."

The customer cannot tell whether anyone read their note about the water heater, who is handling it, or what they should send next.

Strong example

"Hi Mark, saw your note about the water heater on Oak Street. Is it leaking right now, or still holding water?
Cody, drafted for Mike's Plumbing"

The message names the customer, the equipment, and the street from the form, asks one question to separate an active leak from a standard quote, and puts the sender's name and shop on its own line.

Caution for your shop: Never promise a callback window your trucks cannot keep.

Draft first replies beside the job record in Omni Studio

When you want every new request drafted this way without typing from scratch between jobs, we set up Cody to read each incoming inquiry, match it against your past customer list, and draft a two-line reply beside the job record. Nothing goes out until you approve it. On each card you choose "Edit", "Reject", or "Approve and send".

Your first step is the Free 14-day workspace, no credit card. It runs on sample data for a made-up business, where calls, texts, and email are simulated and daily limits apply.

[Start the free 14-day workspace](#)

Related guides and workflows

[See the estimate and quote follow-up workflow](#)

[Read the estimate follow-up playbook for contractors](#)