

The Follow-Up Swipe File

20 ready-to-send messages for the moments leads go cold.

How to use this file

Every message here does one job: it stops the prospect's next-name-on-the-list reflex before a competitor's phone rings. The research is blunt about how much the first reply matters. RevenueHero's 2024 study of 1,000 B2B companies found 63.5% never responded to inbound leads at all, and the average response took over a day. MIT and InsideSales.com found the odds of qualifying a lead drop about 21x when the first response slips from 5 minutes to 30. NAR's 2024 data shows 78% of buyers work with the first agent who responds.

Three rules travel with every message:

1. **Speed is the feature.** The first response can be short. It cannot be slow. Automate the send trigger, not the relationship.
2. **One list.** Every inquiry, call, text, DM, and form fill lands in one place with a timestamp. Nothing lives only in someone's personal phone.
3. **A human closes the loop.** Automated acknowledgments buy time. A person still makes the call, runs the estimate, gives the advice, and makes every judgment call. Anything regulated (medical, legal, leasing decisions) stays informational until a person takes over.

Replace bracketed fields. Adjust tone to match how you actually talk. These are starting points, not scripts to recite.

Section A: The first response

The only goal is acknowledgment inside minutes. No selling, no details you might get wrong, no promises a human has to unwind later.

1 Missed-call text-back

HOME SERVICES, TRADES · SEND: WITHIN 1 MINUTE OF A MISSED CALL, AUTOMATIC · CHANNEL: SMS

Hi, this is [Name] at [Company]. Sorry we missed you just now. Are you dealing with something urgent? Reply here and we'll get you scheduled.

Why it works: the caller was about to dial the next company on the list. This text ends that search. A person calls back as soon as they're free.

2 New-patient or new-client call ack

CLINICS, WELLNESS · SEND: WITHIN MINUTES OF A MISSED FRONT-DESK CALL · CHANNEL: SMS

Hi, this is [Practice]. We saw your call and we're sorry we missed it. If you'd like an appointment, reply here or use this link: [scheduling link]. If this is a medical emergency, please call 911.

Guardrail: keep it purely logistical. No clinical questions, no symptom talk, and run it inside HIPAA-compliant tools under a signed BAA. A person handles anything clinical.

3 Web-form inquiry ack

PROFESSIONAL SERVICES · SEND: SAME BUSINESS HOUR THE FORM ARRIVES · CHANNEL: EMAIL

Hi [First name], thanks for reaching out to [Firm]. Your message came through and it's in front of the right person now. You'll hear from [me/us] by [specific time, same or next business day] with next steps. If it's time-sensitive, reply here and say so.

Why it works: Clio's 2024 data found 60% of law firms never answered email inquiries at all. Answering the same hour puts you ahead of most of the field before anyone has talked price.

4 DM or inbox ack

COACHES, CREATORS · SEND: WITHIN THE HOUR, OR BATCHED TWICE A DAY MINIMUM · CHANNEL: THE PLATFORM THE MESSAGE ARRIVED ON

Got your message. I read every one of these myself and I'll follow up within a day. If you're asking about [main offer], the short version is here: [link].

Guardrail: keep the automated part honest. If a tool sends this, a human really does read and reply within the promised window.

5 New buyer lead ack

REAL ESTATE · SEND: WITHIN 5 MINUTES, ANY PORTAL · CHANNEL: SMS OR EMAIL

Thanks for reaching out about [address]. I'll call you shortly. In the meantime, is there a time that works best for you?

Why it works: 78% of buyers work with the first agent who responds (NAR 2024). This message makes you first even when you're mid-showing. A licensed agent still makes the actual call.

6 Leasing inquiry ack

PROPERTY MANAGEMENT · SEND: WITHIN MINUTES · CHANNEL: MATCH THE INBOUND CHANNEL

Hi [First name], thanks for your interest in [unit/address]. It's currently available. Rent is [amount], and showings are open this week. Want me to send you times? Reply here and we'll get one booked.

Guardrail: strictly informational. Availability, price, showing times. Nothing that could read as a qualifying statement about fit. A person reviews every application and makes every leasing decision.

7 After-hours catch-all

ANY BUSINESS · SEND: AUTOMATIC OUTSIDE BUSINESS HOURS · CHANNEL: SMS OR EMAIL AUTORESPONDER

Thanks for reaching out to [Company]. We're closed right now, but your message is logged and you're first in line when we open at [time]. If it's urgent, reply URGENT and it goes to [Name]'s phone.

Why it works: the lead knows they were heard, so they stop shopping. The URGENT path means real emergencies still reach a human.

Section B: The follow-up ladder

Follow-up dies when it depends on memory. Put each of these on a clock the moment the bid, quote, or conversation goes out.

8 Bid-sent confirmation, day 0

CONTRACTORS · SEND: THE SAME DAY THE BID GOES OUT · CHANNEL: EMAIL OR TEXT

[Name], your bid for [project] just went over. The number is [amount], good through [date]. Two things worth flagging: [one line on scope, one line on timeline]. Happy to walk through any line item. When were you hoping to make a decision?

Why it works: it confirms arrival, sets an expiration, and asks for the decision date, which tells you exactly when messages 9 and 10 should fire.

9 Bid follow-up, day 2 or 3

CONTRACTORS · SEND: 2-3 DAYS AFTER THE BID, EARLIER IF THEIR DECISION DATE IS CLOSE · CHANNEL: SAME THREAD

[Name], checking in on the [project] bid. Any questions on the numbers or the schedule? If something in there doesn't fit, tell me and we'll look at options.

10 Bid follow-up, day 7

CONTRACTORS · SEND: ONE WEEK AFTER THE BID · CHANNEL: PHONE CALL FIRST, THEN THIS TEXT IF NO ANSWER

[Name], wanted to close the loop on the [project] bid before our schedule fills for [month]. If you've gone another direction, no hard feelings, just let me know so I can release the slot. If you're still deciding, what's the holdup I can help with?

Why it works: a real deadline (crew scheduling) without fake urgency, plus permission to say no, which gets you an answer either way.

11 Quote-sent note, same day

HOME SERVICES · SEND: THE SAME DAY AS THE VISIT OR CALL, NOT FRIDAY'S BATCH · CHANNEL: TEXT OR EMAIL

[Name], here's your quote for [job]: [amount], parts and labor included, good for [X] days. We can get you on the schedule as early as [date]. Want me to hold that slot?

Why it works: the quote that arrives while the conversation is still warm is competing with nobody. The one that waits until Friday is competing with everyone who answered sooner.

12 Quote nudge, day 3

HOME SERVICES · SEND: 3 DAYS AFTER THE QUOTE · CHANNEL: SAME THREAD

Hi [Name], following up on the [job] quote. Schedules are filling for [week/month], so if you'd like that [date] slot I mentioned, reply here and it's yours. Questions about the quote? Ask away.

13 Two-week re-engage

ANY SEGMENT · SEND: 14 DAYS AFTER LAST CONTACT, WHEN A WARM LEAD HAS GONE QUIET · CHANNEL: EMAIL OR THE ORIGINAL CHANNEL

[Name], you asked about [project/service] a couple weeks back and I didn't want it to fall through the cracks on my end. Still on your list? If the timing moved, tell me when to check back and I will. If you went another way, no problem, just say so.

Why it works: it takes the blame ("on my end"), offers an easy exit, and asks for a specific check-back date, which converts silence into a scheduled follow-up.

14 30-day revival

ANY SEGMENT · SEND: 30 DAYS AFTER LAST CONTACT, ONCE, THEN STOP · CHANNEL: EMAIL

[Name], last time we talked, [project/service] was on your plate but the timing wasn't right. If it's back on the radar, I'd be glad to pick it up where we left off. If not, this is my last nudge, and you know where to find me.

Guardrail: one revival, then the lead moves to a long-term list. Nobody wants message 31.

Section C: The handoffs

The moments between yes and done are where good operations show.

15 Appointment or showing confirmation

ANY SEGMENT · SEND: IMMEDIATELY ON BOOKING, PLUS A REMINDER THE DAY BEFORE · CHANNEL: SMS

Confirmed: [service/showing] on [date] at [time] with [Name] at [address]. Need to change it? Reply here and we'll reschedule, no phone tag required.

16 Post-consult recap

PROFESSIONAL SERVICES, COACHES · SEND: WITHIN 24 HOURS OF THE MEETING · CHANNEL: EMAIL

[Name], good talking today. What I heard: [two-line summary of their situation]. What happens next: [step], which I'll have to you by [date]. If I missed something or got it wrong, reply and set me straight.

Why it works: the recap proves you listened, puts the next step on a date, and surfaces misunderstandings while they're cheap to fix.

17 Referral thank-you

ANY SEGMENT · SEND: THE DAY A REFERRAL COMES IN, BEFORE YOU'VE WON THE WORK · CHANNEL: TEXT OR HANDWRITTEN, NOT A FORM EMAIL

[Name], [referred person] just reached out and mentioned your name. Thank you. I'll take good care of them. Referrals like this are how we grow, and I don't take it lightly.

Section D: The cash bridge

Sent and paid are different events. These three keep the gap from becoming your problem. If invoices are your bigger leak, the full sequence with the escalation ladder and the 15-minute weekly review lives in the Invoice-Chase Kit at builtwithjon.com/kits/invoice-chase-kit/.

18 Invoice-sent notice, day 0

ANY SEGMENT · SEND: THE MOMENT THE INVOICE GOES OUT · CHANNEL: EMAIL, TEXT OPTIONAL FOR FIELD CLIENTS

[Name], invoice [number] for [project] just went over: [amount], due [date]. Link to pay: [link]. Anything look off, tell me now and we'll fix it before the due date.

Why it works: it starts the clock in both calendars and flushes out disputes early, which are the number one reason invoices stall past 30 days.

19 Friendly reminder, day 7 past due

ANY SEGMENT · SEND: 7 DAYS AFTER THE DUE DATE, DRAFTED AUTOMATICALLY, SENT BY A HUMAN · CHANNEL: EMAIL

Hi [Name], a quick note that invoice [number] ([amount]) came due on [date]. Probably just slipped through, it happens. Here's the payment link again: [link]. If something's holding it up, tell me and we'll work it out.

20 Firm follow-up, day 30 past due

ANY SEGMENT · SEND: 30 DAYS PAST DUE, AFTER A PHONE CALL ATTEMPT · CHANNEL: EMAIL, CC WHOEVER HANDLES THEIR PAYABLES

[Name], invoice [number] for [amount] is now 30 days past due. We need to get this resolved this week. If there's a problem with the work or the invoice, I want to hear it. Otherwise, please confirm a payment date by [day]. I'd rather fix this together than change how we work on the next project.

Guardrail: a person reviews and sends every reminder. The draft runs on a clock; the judgment about tone, waivers, and payment plans stays human.

The number behind all of this

If you want to know what slow follow-up actually costs your business in dollars, run your own numbers in the **Leak Calculator**: builtwithjon.com/tools/leak-calculator/. Three or four inputs you already know, sixty seconds, and a figure you can prioritize against.

And if the problem is bigger than wording, the **Hidden Profit Scorecard** at builtwithjon.com/scorecard/ ranks where your operation leaks worst across deals, time, and cash.

Sources: RevenueHero 2024 lead response study (n=1,000); MIT/InsideSales.com Lead Response Management study via Harvard Business Review; NAR 2024 Profile of Home Buyers and Sellers; Clio 2024 Legal Trends Report.

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