

Three open jobs. Three clear next steps.

A quick look at where work is waiting - and what to do about it.

03 / 03

Jobs need a next step

\$9,600

Expected final balance*

11 DAYS

Longest gap since update

*Amount shown in this fictional owner record; not verified or guaranteed due.

PART 01 / WHAT NEEDS ATTENTION

Actions for the next 48 hours

JOB 01 AFTER INSTALL

PAYMENT STEP

Final payment paperwork not sent

Roof is marked complete. The close-out packet is not marked as sent.

\$9,600 expected final balance is still waiting on a paperwork step.

DO NEXT Confirm required documents; send them and log the date.

Office lead / NEXT WORKDAY

JOB 02 OPEN CLAIM

FOLLOW-UP GAP

Supplement follow-up has no date

A \$4,200 supplement request was logged, but no status check in 11 days.

The request is unresolved. That \$4,200 is NOT approved or owed.

DO NEXT Assign a coordinator to check status and set the next reminder.

Claims coordinator / WITHIN 2 DAYS

JOB 03 NEW BUSINESS

SALES HANDOFF

Homeowner quote left without a reply

A \$12,500 estimate was sent 6 days ago; no reply is recorded.

A possible new job could go cold. It is NOT booked revenue.

DO NEXT Call the homeowner, confirm interest, and log the result.

Sales rep / TODAY

Three jobs. One possible pattern.

What these gaps could mean - and how to stop the same misses next time.

PART 02 / EXECUTIVE ANALYSIS

The real risk is the next missed handoff.

01 / WHAT THE THREE JOBS SHOW

These three jobs are stuck at different stages. A finished roof has no close-out packet marked as sent. A supplement request has gone 11 days with no logged status check. A homeowner estimate has no recorded reply after six days. The common thread may be a missing handoff: someone needs to own the next step and know when to check back. That is a warning sign, not proof that the whole team or CRM is broken.

POSSIBLE ROOT CAUSE

No set check when a job changes hands.

02 / WHAT THE MONEY MEANS

The \$9,600 is an expected final balance tied to paperwork, not verified overdue cash. The \$4,200 supplement has not been approved and may never be owed. The \$12,500 estimate is a chance to win work, not booked revenue. These numbers should not be added up as money lost. They show three different ways a missing next step can affect cash flow, open work, or a future customer.

EXPOSURE, NOT LOST REVENUE

Track cash, requests, and open quotes separately.

EXAMPLE ONLY / Fictional jobs and dollar amounts; no real client findings.

PART 03 / WHY A BETTER PROCESS MATTERS

WHEN NO ONE OWNS THE NEXT STEP

Work waits. Staff search for updates.
The owner ends up chasing.

WHEN EVERY NEXT STEP IS CLEAR

One person owns it. A date is set.
Late tasks are easier to spot.

THE RECOMMENDED NEXT MOVE

First, give each job one owner, one next action, and a check-back date. Then review more jobs to see if these are isolated misses or a repeat problem. If the gaps keep showing up, a follow-up system around the tools you already use could flag late tasks and make each handoff clear. A deeper 90-day audit can help measure the pattern before deciding what, if anything, to build.