Give stalled opportunities a next step.

REVENUE RECOVERY RESET KIT / Turn a quiet pipeline into a clear seven-day worklist.

START HERE / 15 MINUTES

Choose five existing opportunities with a legitimate reason to follow up. Identify the last agreed step, the obstacle, and the person who owns the next conversation.

01 Separate recoverable from simply old.

Start with unanswered estimates, paused decisions, or incomplete booking steps. Include only work you can still deliver. Check the history and contact preferences before reaching out.

KEEP THREE THINGS SEPARATE

Open opportunity: possible work, not revenue.
Agreed work: accepted scope, not collected cash.
Payment received: confirmed money received, recorded once.

Where will you look? (for example: estimate log, inbox, or CRM)

Period to review

Owner of this seven-day reset

Route, do not chase: completed, declined, duplicate, opted-out, disputed, or no-longer-fit records need a clear status. Handle invoice disputes and overdue-account issues through your normal billing process.

This is a workflow tool, not a debt-collection script. No recovery rate or revenue increase is promised.

Build a five-opportunity worklist.

Use internal references only. Keep private contact information in your existing business system.

For each record: find the last agreed step, verify current interest, name the blocker, then set one next action and due date. If the facts are missing, the first action is to check the record.

01

Record ID / status

Last agreed step / current blocker

Next action + owner + due date

02

Record ID / status

Last agreed step / current blocker

Next action + owner + due date

03

Record ID / status

Last agreed step / current blocker

Next action + owner + due date

04

Record ID / status

Last agreed step / current blocker

Next action + owner + due date

05

Record ID / status

Last agreed step / current blocker

Next action + owner + due date

Useful statuses: confirm interest / missing information / decision pending / paused until a date / closed. Close records honestly; a cleaner pipeline is useful even when no sale follows.

Reopen the conversation with context.

Personalize one relevant message. Diagnose the obstacle before offering a discount.

NO DECISION ON AN ESTIMATE

"When we last spoke, you were considering [scope]. Is that still a priority? Is the next step held up by timing, missing information, budget, or something else?"

INTEREST WAS REAL, TIMING WAS WRONG

"You mentioned revisiting [project] around [time]. Has anything changed? If it is still useful, we can confirm the next step. If it is off the table, I can close the loop."

THE CONVERSATION ENDED WITHOUT AN ANSWER

"I am closing the loop on [request]. Would you like to move forward, revisit it on a specific date, or close it for now? Any of those is helpful so I can update our records."

02 Use the answer to choose the action.

Still interested: confirm the missing piece and agree a next step.
Later: agree on a date and who initiates the follow-up.
No: record the reason if offered, then close the record.
No answer: follow your agreed cadence, then park the record. Respect opt-outs.

What is the real obstacle? What did the prospect actually confirm?

Avoid invented urgency or blanket discounts. Confirm scope, capacity, current pricing, and any approval needed before making a commitment.

Measure movement, then money.

A reply is progress. It becomes revenue only through the real commercial steps that follow.

DAY 1	Review five records; remove duplicates and unsuitable follow-ups.
DAY 2	Assign each next action and check the actual history.
DAYS 3-6	Make relevant contact; update status after each real response.
DAY 7	Review outcomes. Schedule the next action or close the record.

03 Your seven-day review.

Of 5 reviewed: contacted

Of 5 reviewed: replied

Of 5: next step agreed

Closed / not a fit (count)

Paused with a revisit date (count)

Newly agreed work value (if any)

Payments actually received (if any)

Counts can overlap; use each record once per measure. Do not add agreed work value to payments received: the same job may appear in both. Check source records and record currency consistently.

Be honest about impact. This review shows what moved during the week. It does not prove every sale or payment happened because of the reset. Use recorded reasons and compare future periods.

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