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FREE CHECKLIST · TRADES & HOME IMPROVEMENT

Where Your Leads Are Leaking.

The Tradie's 9-Point Lead Checklist

27 quick yes or no checks across the nine stepping stones of The Epsillon Method. Ten minutes with a cuppa and you'll know exactly where enquiries are slipping away, and what to fix first.

1 Targeting	2 Offer	3 Traffic
4 Capture	5 Speed-to-Lead	6 Nurture
7 Convert	8 Retain	9 Optimise

START HERE

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Most tradies don't have a lead problem. They have a leak.

You do good work. People ring, fill in forms and message your page. But somewhere between the first click and the booked job, enquiries slip away. A missed call while you're on site. A quote nobody followed up. A homeowner who wasn't ready yet and never heard from you again.

Each of those is a leak. Most businesses have a few, and they're usually cheaper to fix than buying more leads.

This checklist walks through the nine stepping stones of **The Epsillon Method**, the system we use with trades and home-improvement businesses. Each one has three yes or no checks, why it matters and one quick fix you can do yourself.

PHASE 1

Fill the Pipeline

Get the right people asking for a quote.

Targeting · Offer · Traffic

PHASE 2

Lock the Follow-Up

Make sure no enquiry slips through.

Capture · Speed-to-Lead · Nurture

PHASE 3

Scale the System

Turn more enquiries into jobs and keep them coming.

Convert · Retain · Optimise

How to use it

1. **Be honest.** Tick Yes only if it happens every time, not just when you remember.
2. **Score each phase** out of 9 at the bottom of its page.
3. **Start with your lowest phase.** Fix the quick wins there first. Page 6 shows what your score means.

PHASE 1

Fill the Pipeline

Get the right people asking for a quote.

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01 Targeting

Why it matters. If your marketing talks to everyone, it lands with no one. Knowing your best job and your best customer makes every dollar of ad spend work harder.

Can you name the one job you want more of, and roughly what it's worth to you?	☐ Yes	☐ No
Do you know which suburbs that job is worth driving to?	☐ Yes	☐ No
Could you describe your ideal customer's biggest problem in the words they use on the phone?	☐ Yes	☐ No

QUICK FIX

Pick one key service to focus on first. Write down the top three problems it fixes for homeowners, in their words. That list becomes your ad copy.

02 Offer

Why it matters. "Quality workmanship, competitive prices" is what everyone says. A clear, specific offer gives people a reason to put their hand up instead of scrolling past.

Does your ad give people a clear reason to enquire now, not someday?	☐ Yes	☐ No
Is the next step one simple action, like booking a free measure or quote?	☐ Yes	☐ No
Does it say what makes you different from the next three businesses on Google?	☐ Yes	☐ No

QUICK FIX

Turn your best selling point into a specific next step. For example: "Free in-home measure and quote. Pick a time online." Specific beats clever.

03 Traffic

Why it matters. Stop-start marketing creates the feast-and-famine cycle. You run ads when it's quiet, get busy, switch them off, and three months later you're quiet again.

Are your ads running every week, not just when work dries up?	☐ Yes	☐ No
Are they shown only to people in your service area?	☐ Yes	☐ No
Do you know which ad or channel brought in each enquiry?	☐ Yes	☐ No

QUICK FIX

Set a modest daily budget you can hold for 90 days instead of a big burst. Longmire Cabinets launched on around $20 a day and the first leads came in the next day.

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Phase 1 score: _____ / 9 yes

PHASE 2

Lock the Follow-Up

Make sure no enquiry slips through.

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04 Capture

Why it matters. Enquiries scattered across a notebook, a Facebook inbox, emails and your phone get lost. Every lost enquiry is ad money you've already spent.

Do calls, web forms, Facebook messages and emails all land in one place?	☐ Yes	☐ No
Could someone else in your business see every open enquiry today?	☐ Yes	☐ No
Do you record where each enquiry came from?	☐ Yes	☐ No

QUICK FIX

Choose one home for every enquiry this week. A CRM is best. Even a shared spreadsheet beats five different inboxes.

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05 Speed-to-Lead

Why it matters. Homeowners often contact a few businesses at once. The first one to reply properly is usually the one that gets the conversation, and the measure.

Does every new enquiry get a reply within minutes, even when you're on site?	☐ Yes	☐ No
Do missed calls get an automatic text back?	☐ Yes	☐ No
Can people book a measure or quote time without needing a phone call?	☐ Yes	☐ No

QUICK FIX

Write a short instant reply by SMS and email. Thank them, say who will call and when, and include a booking link. Then automate it.

06 Nurture

Why it matters. Plenty of people aren't ready on day one. They're saving up, waiting on a partner or comparing quotes. People buy from businesses they know, like and trust, and good follow-up builds that.

Do enquiries that don't book get followed up more than once?	☐ Yes	☐ No
Are your follow-up messages written and ready, not made up each time?	☐ Yes	☐ No
Do leads who go quiet hear from you again weeks later?	☐ Yes	☐ No

QUICK FIX

Write a simple sequence for day 1, 3, 7 and 14. Keep it conversational, like you're talking across the counter, with one useful tip in each message.

Phase 2 score: _____ / 9 yes

PHASE 3

Scale the System

Turn more enquiries into jobs and keep them coming.

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07 Convert

Why it matters. A quote that never gets followed up is a paid-for lead gone cold. Plenty of jobs are won in the follow-up, not the first visit.

Do quotes go out within a set timeframe you could name?	☐ Yes	☐ No
Does every quote get a follow-up call or message?	☐ Yes	☐ No
Can you see every open quote, and what it's worth, at a glance?	☐ Yes	☐ No

QUICK FIX

Set a simple rule: every quote gets followed up on day 2 and day 7. Track jobs in five stages: New, Quoted, Followed up, Won, Lost.

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08 Retain

Why it matters. Past customers already trust you. Reviews help new customers trust you faster. Both bring in work without paying for a brand-new lead.

Do you ask every happy customer for a Google review?	☐ Yes	☐ No
Do you get back in touch with past customers about new work?	☐ Yes	☐ No
Do you ask for referrals, and thank people who send them?	☐ Yes	☐ No

QUICK FIX

Send a review request the day each job is signed off. Make a list of past customers and contact them at least once a year.

09 Optimise

Why it matters. Without numbers you're guessing where the money should go. With them, you can fix the leak that costs you the most and scale what works.

Do you know how many enquiries you got last month?	☐ Yes	☐ No
Do you know your cost per lead and how many leads turn into jobs?	☐ Yes	☐ No
When you change something, do you change one or two things at a time and track the result?	☐ Yes	☐ No

QUICK FIX

Start a monthly scorecard: enquiries, quotes, jobs won, ad spend. Solomons Flooring's cost per lead came down from $41.45 to $6.28 as their campaigns were refined month by month.

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Phase 3 score: _____ / 9 yes

YOUR RESULTS

Add it up. Find your biggest leak.

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PHASE 1	PHASE 2	PHASE 3	TOTAL
Fill the Pipeline	Lock the Follow-Up	Scale the System	All nine stones
/ 9	/ 9	/ 9	/ 27

22 to 27	**A tight system.** Your basics are in place. Look at Optimise and Retain to grow without adding more hours.
14 to 21	**A few leaks.** Start with the phase where you ticked the most No's. That's where enquiries are slipping away.
0 to 13	**Leaks in the pipe.** Don't spend more on ads yet. Fix Capture and Speed-to-Lead first so the leads you're already paying for don't go cold.

Know your numbers

Grab last month's figures. Even rough numbers are a useful starting point, and they tell you where to look first.

Enquiries received		**Quotes or measures booked**	
Jobs won		**Ad spend**	
Cost per lead ad spend ÷ enquiries		**Enquiry to job rate** jobs won ÷ enquiries	

Example: 60 enquiries a month, 15 measures booked, 5 jobs won. That's 1 job for every 12 enquiries. Tighten the follow-up so 1 in 8 becomes a job and that's 7 or 8 jobs from the same ad spend.

FREE TOOL

Get the free tool: Owner's Marketing Dashboard

It works these numbers out for you each month, plus cost per lead by source and a 12-month trend.

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2,155 leads for Longmire Cabinets, Aug 2023 to Dec 2025, at an average of $7.82 each

1,296 leads for Solomons Flooring in Midland over 24 months, around 54 a month

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NEXT STEP

Want a second set of eyes on your leaks?

Book a free Theta Analysis. It's a 15-minute call, not a sales pitch. We'll go through your checklist, show you where enquiries are most likely slipping away, and tell you straight whether we can help.

- Free, 15 minutes, by phone or video
- Bring your score and last month's numbers
- If we're not the right fit, we'll say so

Book your free Theta Analysis

go.epsillonmedia.au/widget/booking/ZMdutLs6g5N2uBUDDYpD

> **“Since my website and leads account has been live it has brought me so much work my way.”**
>
> Brendon Longmire, Longmire Cabinets

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Epsillon Media · ABN 25 590 527 084 · Perth, Western Australia. This checklist is general information to help you review your own marketing. Results depend on your market, offer and follow-up.