



ESTIMATE RECOVERY · FOR HVAC CONTRACTORS

You already quoted the job. Now let's win it.

ARMKU Estimate Recovery follows up on every open replacement estimate your team writes. AI drafts the message, a person approves it, and it goes out in your company's name. Interested homeowners come back to your office ready to book.

Nothing goes out without approval

Every message is reviewed by a person and uses only facts your office signed off on.

Your pricing. Your voice. Your schedule.

We never quote, discount or promise a date. Your team does what it does best.

Measured in paid jobs, not opens

Every reply, appointment and sold job is tied back to the original estimate number.

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HOW TO START

Test it on your open estimates

First month on up to 100 estimates. Like what you see, we keep going and grow it. No contract either way.

WHERE THE MONEY LEAKS

The most expensive lead you have is the one you already quoted.

Think about what a replacement estimate costs you before a single dollar comes in: the phone call, the truck roll, a technician's hour in the attic, a written proposal. Then the homeowner says the words every contractor knows: **"Let me think about it."**

Meanwhile the phone keeps ringing. Service calls take priority because they pay today. The salesperson who wrote the quote means to call back, and sometimes does, once. Two weeks later the estimate is buried under fifty newer tickets.

The customer didn't disappear. They got busy, got a second quote, or waited for someone to make it easy. Whoever follows up wins the job. Most of the time, nobody does.

Sound familiar?

- Follow-up depends on whoever wrote the quote, and how busy they are that week.
- One call, maybe a text, then silence.
- Nobody can say how many estimates are open right now, or what they add up to.
- The CRM has a "follow-up" field that nobody fills in.
- The customer who said "maybe" in April bought from someone else in June.

QUICK MATH

30

replacement estimates written in a typical month

10

close on their own, the way they do today

20

stay open. At a \$9,000 average ticket that is about **\$180,000** of quoted work sitting in a folder

+2

won back with steady follow-up is **\$18,000** in revenue and roughly **\$5,400** in gross profit at a 30% margin. Every month.

Example only. On the fit call we plug in your real volume, ticket and margin.

What changes with Estimate Recovery

- ✓ Every open estimate has an owner, a next step and a date.
- ✓ Follow-up happens on day 0, 4 and 10 whether the shop is slow or slammed.
- ✓ You see the number that matters: quoted jobs that turned into paid installs.

The follow-up problem is not laziness. It is that nobody owns it. Estimate Recovery gives every open quote an owner, a next step and a date, and shows you what came of it.

HOW IT WORKS

Five steps. Your office stays in control at every one.

1

Import your open estimates

You send an export of open replacement estimates. A CSV from ServiceTitan, Housecall Pro, Jobber, FieldEdge or a plain spreadsheet all work. We need the estimate number, customer, contact, date, amount, salesperson and status.

You: about 30 minutes, once. **We:** clean, dedupe and load it.

2

Set the rules together

Which estimates are eligible (typically 7 to 45 days old) and which are never touched: sold, cancelled, disputed, opted out, or already being worked by your team. Every estimate gets exactly one record, so nobody is ever messaged twice.

You: approve the rules and the wording. **We:** enforce them on every send.

3

Follow up, reviewed by a person

For each eligible estimate the system drafts a short, personal note in your company's voice using only approved facts: financing options, current promotions, warranty, how to book. A person reviews it, then it goes out from your office mailbox. Day 0, day 4, day 10, then we stop.

You: nothing, unless you want to see drafts first. **We:** draft, review, send, log.

4

Route every reply

"I'm ready" goes straight to your office to book. A technical or price question goes to the person you named. "We went with someone else" gets logged so you learn why. "Stop" is honored immediately, everywhere.

You: book the appointment and close the sale. **We:** make sure nothing waits.

5

Report in numbers you can act on

Every Monday, one page: estimates touched, replies, appointments booked, jobs sold and revenue, all tied to the original estimate number. At month end we review it together and decide what to change.

You: 10 minutes a week. **We:** the rest.

WHAT NEVER LEAVES YOUR HANDS

- Pricing, discounts and financing approval
- Scheduling and availability
- Technical answers about equipment
- The customer relationship

The system prepares and organizes. Your people decide.

FRESH BEFORE EVERY SEND

Status is refreshed against your latest export before anything goes out. A quote that was sold yesterday is never followed up today.

WORKS WITH WHAT YOU HAVE

No new software for your team to learn. No changes to your CRM or dispatch board. Results come back to the people and tools you already use.

WHAT YOU GET

Everything included. Nothing hidden.

Included in every engagement

- ✓ A cleaned, deduplicated queue of your open estimates
- ✓ Up to three human-reviewed follow-ups per estimate
- ✓ Messages in your company name, from your mailbox
- ✓ Reply routing to the right person on your team
- ✓ Opt-out and do-not-contact handling, every channel
- ✓ A weekly one-page report tied to estimate numbers
- ✓ A month-end review call
- ✓ Your data returned or deleted at the end, your choice

WHAT WE NEED FROM YOU

- A current export of open estimates
- Approved wording, offers and financing facts
- One office contact who books appointments
- Job outcomes: sold, not sold, amount
- About 10 minutes a week

Built-in safeguards

Human approval

Every message is read by a person before it goes out. No exceptions.

No double messaging

One record per estimate. Duplicates are merged before anything is sent.

Fresh status

Sold, cancelled or in-progress estimates are excluded before every send.

No promises the AI can't keep

Price, dates and availability are only ever quoted by your team.

Stop means stop

An opt-out applies instantly to email and any channel added later.

Pause any time

One email from you pauses everything. Nothing is locked in.

Questions owners ask us

Does this replace my CRM or dispatch software?

No. It works from an export and hands results back to your office. Nothing in your system changes.

What about texting?

We start with email, which needs no carrier registration. Text messaging is added only once consent records and A2P registration are in place.

Will customers know AI is involved?

A person approves every message and it goes out from your office, in your voice. It reads like your office wrote it, because your office approved it.

What if the customer already bought?

Tell us, or let the export show it, and the estimate is closed on the spot. We would rather skip ten than message one wrong person.

GETTING STARTED

Test it on the estimates you already have open.

THE FIRST MONTH

Your open estimates. Our follow-up.

Flat monthly fee sized to your estimate volume, confirmed on the call. No contract, no setup fee, no per-user licensing. Cancel any month.

- ✓ Up to 100 open replacement estimates to start
- ✓ Set up within 5 business days of receiving your export
- ✓ Queue cleanup and rules agreed with your office
- ✓ Up to three reviewed follow-ups per estimate
- ✓ Reply routing to your team, opt-outs handled
- ✓ Weekly one-page report and a month-end review call

After the first month, you choose

Continue

Same scope, month to month.
Follow-up on every new estimate as it comes in.

Grow

More estimates, texting once consent is in place, service agreements, the CRM side of the office.

Stop

Keep the report and the cleaned queue. No further cost, no hard feelings.

EXAMPLE ONLY Does it pay for itself?

One recovered \$9,000 replacement at a 30% gross margin is about \$2,700 in gross profit. Your ticket size and margin decide the real number. That is why the Monday report shows it, not us.

Next step: a 15-minute call

We check three things: that you have enough open estimates, that you can take on more installs, and that there is a real follow-up gap. If it isn't a fit, we'll say so, and you'll still leave with a clearer picture of your open quotes.

Or simply reply to the email this came with.

Also from ARMKU: a CRM without per-user licensing

If keeping track of customers is a headache too, spreadsheets, a CRM nobody updates, or one that charges for every seat, we set up and run open-source systems like Odoo at very competitive prices. One flat cost, no per-user fees, and your data stays yours. Ask about it on the call.

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ABOUT ARMKU

ARMKU is a Houston technology consultancy. We build and operate business systems, from ERP and CRM to automation and AI workflows, for owner-run companies in the U.S. and Latin America, on open-source platforms whenever they fit.