Example Heating & Air

Open estimate review · export of Sep 17, 2026 SAMPLE

Three open estimates need your attention first.

$42,425 in quoted replacement work. Everything else is sorted.

How we got there

72	29	10	3
estimates in your export	still open · $206,900	large, with no current plan	need a management decision

Your three

Large replacement quotes, all younger than 36 days (the longest any recorded replacement win took), with no current next step in the CRM. Each comes down to one question.

1 EST-1048 — $15,625

17 days old · no owner or next step recorded

→ Who is handling this one?

2 EST-1052 — $15,025

17 days old · Sep 13 step passed, nothing logged since · no owner recorded

→ Did the Sep 13 step happen?

3 EST-1040 — $11,775

32 days old · Aug 31 step passed, nothing logged since

→ Did the Aug 31 step happen?

If the job is live, make sure it has an owner and a dated next step. If not, update its status.

Everything else, already sorted

None of the other 26 was flagged for a management decision. Twenty-two are in a prepared queue for your team, each with its reason and its check.

7

$65,925

Larger quotes to confirm are still live.

Older than the reference time for their job type, with no upcoming step and no activity in the last 30 days. Some may already be sold or lost.

15

$87,575

Records with a gap to fill.

A missing owner, a missing next step, or a step date that has passed. Record-keeping, not a management decision.

4

$10,975

Not surfaced by any check.

Each has an owner and a next step recorded. Not flagged is not the same as on track.

What your pipeline shows

23 of 29

$123,600 · 60% of your open value

open estimates are older than the reference time for their job type. For replacements, that is your slowest recorded win.

This doesn't mean they're lost. It means much of what reads as open pipeline may not be live work, and the CRM alone can't show which. The seven status checks start to answer that.

Also in your records

11 of 29	open estimates have no next step recorded.
10 of 18	scheduled next steps have passed with nothing logged after them.

What happens now

You

Answer the three questions on page 2.

Suggested: this week.

Your team

Work through the prepared queue: 7 status checks, 15 record fixes.

The queue file comes with this review, one row per estimate, with the reason and the check.

Marginry

This review is complete.

Every review is checked by a person before it is sent.

Not included in this review

A later comparison against a fresh export, to see what moved. Available separately, on request.

Pages A–C show our reasoning. You don't need them to act.

A · Your three, in detail

For checking our reasoning.

1 EST-1048 Replacement — $15,625

Created	Aug 31
Age	17 days · reference 36
Owner	not recorded
Next step	not recorded
Last activity	Sep 7

Why it surfaced

Upper half of open estimates by amount, younger than your slowest recorded replacement win, with no next step and no owner recorded.

What the export can't show

Who is handling it, and whether anyone has spoken to the customer since Sep 7.

2 EST-1052 Replacement — $15,025

Created	Aug 31
Age	17 days · reference 36
Owner	not recorded
Next step	Sep 13 · passed
Last activity	not recorded

Why it surfaced

Upper half by amount, younger than the reference, and its planned Sep 13 step passed with nothing logged after. No owner recorded.

What the export can't show

Whether the Sep 13 step took place.

3 EST-1040 Replacement — $11,775

Created	Aug 16
Age	32 days · reference 36
Owner	recorded
Next step	Aug 31 · passed
Last activity	not recorded

Why it surfaced

Upper half by amount, younger than the reference, and its planned Aug 31 step passed with nothing logged after.

What the export can't show

Whether the Aug 31 step took place.

B · The seven status checks

Also in your team's queue. Shown here so you can see why.

Estimate	Amount	Age	Reference	What the record shows
EST-1036 Replacement	$14,800	123 d	36 d	Last activity Jul 15
EST-1043 Replacement	$13,350	100 d	36 d	Step passed Jun 19, nothing logged since
EST-1032 Replacement	$9,500	96 d	36 d	Step passed Jun 28, nothing logged since
EST-1027 Replacement	$9,075	142 d	36 d	Last activity Jun 10
EST-1055 Replacement	$7,800	124 d	36 d	No next step, no activity recorded
EST-1057 IAQ / Duct	$6,400	102 d	23 d*	Step passed Jun 21, nothing logged since
EST-1068 IAQ / Duct	$5,000	126 d	23 d*	Step passed May 26, nothing logged since

*Only 2 IAQ / duct wins in the export, so an all-job reference is used. The 15 record fixes are listed in the queue file only.

C · How this review works

Method and limits.

How estimates were sorted

1. **Management decision:** upper half of open estimates by amount, within the reference time for the job type, and either a passed next-step date or two of: no next step, no owner, no recent activity.
2. **Status check:** upper half by amount, older than the reference time, with no upcoming step and no activity in 30 days.
3. **Record fix:** any other open estimate with a passed step, no next step, or no owner.
4. Largest first within each group. No scores, weights or predicted close rates.

Reference times

Replacement	36 days	slowest of 8 recorded wins
Repair	5 days	slowest of 17 recorded wins
IAQ / Duct	23 days	all-job reference · only 2 wins

Only estimates marked won in this export are used. The IAQ / duct figure mixes in faster repair jobs.

What the export can't establish

- A blank field means nothing was recorded in the export, not that nothing happened.
- Contact outside the CRM, or what a customer intends.
- Whether any estimate will close. Status is as of the export date.
- Anything about how a person or team performs.