THEORY OF WEALTH

THE CALLBACK KIT.

Every prompt, message and checklist from the video. Copy it, paste it into Claude, send it.

Open the interactive version (copy buttons, checklists): **The $10K/Month AI Business Hiding in Every Roofer's Inbox**

Open Claude: **https://claude.ai/new**

Prompts are in boxes: select the text to copy. All links in this PDF are live.

START HERE

I'm giving you every prompt I'd use to run the Callback Loop. Anything in [BRACKETS] is yours to replace. Paste each prompt into Claude, read what comes back, and only then send anything. You approve every message that goes out, and so does the contractor.

- The loop: Clean the list, Write the message, Sort the replies, Report the results.
- Your offer: reopen his dead estimates and book callbacks. You never pitch AI.
- Your one measure of success: callbacks that actually happen.

1. FIND YOUR CONTRACTOR

Pick one trade and one town. Roofing, heating and cooling, remodels, exteriors. Big tickets, lots of quotes, owners buried in follow-up.

BUILD THE TARGET LIST

```
I run a service that reopens old, unanswered estimates for [TRADE] companies in [TOWN, STATE].
Find 50 companies that look busy: many recent reviews, several trucks or crews, active ads, big-
ticket jobs. For each one give me: company name, owner name if it is public, website, phone, why
they look busy, and the kind of jobs they sell. Then rank them by how likely they are to have
unanswered estimates (bigger jobs, more reviews, no visible follow-up process). Return a table.
```

Use Claude with web search turned on. Check the top ten by hand before you message anyone.

WRITE THE ONE-QUESTION OPENER

```
Write 3 versions of a short message to the owner of [COMPANY]. It must ask exactly one question:
"What happens to your estimates after you send them?" Friendly, under 30 words, no pitch, no
links, no mention of AI. Sound like one local business owner texting another.
```

If he says "we follow up when we remember," you found your client.

WHEN HE SAYS: "WE ALREADY FOLLOW UP."

```
Love that. Could I see last month's list? I'll count how many estimates have no reply logged. If it's zero, you're done and I'll leave you alone.
```

WHEN HE SAYS: "MY CUSTOMERS HATE TEXTS."

```
Fair. These go out in your name and your voice, and you approve every message before it's sent. Three messages at most, and anyone who says stop is gone for good.
```

WHEN HE SAYS: "WHAT IF IT ANNOYS PEOPLE?"

```
Three messages, then silence. Anyone who replies stop is removed permanently. The people on this list already asked you for a price.
```

2. OFFER THE TEST

Don't ask for the whole customer list. Ask for a handful of old quotes he approves.

DRAFT THE PILOT ONE-PAGER

```
Draft a one-page 30-day pilot offer for [OWNER NAME] at [COMPANY]. We reopen his unanswered estimates and book callbacks. Terms: 30 days, [PRICE] per month, one measure of success (callbacks that actually happen), he approves every message before it goes out, maximum three messages per customer, anyone who says stop is removed permanently, weekly report he can read in ten seconds. Plain language, under 250 words, no jargon, no mention of AI.
```

Treat the price as a starting offer, not a law. Have a lawyer review any agreement once before you reuse it.

3. STEP ONE: CLEAN

CLEAN THE DEAD-ESTIMATE LIST

```
Here is a spreadsheet of unanswered estimates: [PASTE OR ATTACH]. Columns may vary. Return a cleaned table with: name, phone, job type, amount, date sent, status. Remove duplicates (same phone or email). Remove any row marked won, accepted, sold or booked. Remove anyone marked do not contact, opted out or stop. Remove anything older than six months. After the table, list every row you removed with the reason, and flag any row where you are unsure so I can check it myself. Do not invent, fix or guess phone numbers.
```

Read the flags yourself. If his quotes are on paper, retype fifty of them first. That's the real work in week one.

4. STEP TWO: WRITE

DRAFT THE FOLLOW-UP IN HIS VOICE

```
Write a first follow-up text from [OWNER NAME] at [COMPANY] to [CUSTOMER FIRST NAME] about the [JOB TYPE] estimate of [AMOUNT] sent on [DATE]. Rules: under 30 words, in his voice (here are three messages he has written before: [PASTE 3 EXAMPLES]), one question, one easy out so they can say no, no discount, no pressure, no mention of AI. Return 3 versions.
```

He approves every message before it goes out.

MESSAGE 1: THE REMINDER

```
Hi {first_name}, it's {owner} from {company}. Still planning the {job} project, or should I close your file?
```

MESSAGE 2: DAY THREE

```
{first_name}, {owner} again. Happy to answer questions on the {job} quote, or send a quick update if timing or prices changed. Want either?
```

MESSAGE 3: THE LAST NOTE

```
Last note from me, {first_name}. I'll close the {job} file unless you want to pick it back up.
Just reply YES. Reply STOP and I won't message again.
```

5. STEP THREE: SORT

SORT EVERY REPLY

```
Here are replies to our follow-up texts: [PASTE REPLIES]. For each reply return: name, label, a
one-line summary, and the next action. Labels: INTERESTED, NEXT MONTH, FINANCING, CHEAPER, STOP,
OTHER. Rules: INTERESTED means book a callback with the owner. NEXT MONTH means one follow-up on
the date they gave. FINANCING and CHEAPER go to the owner, and you never offer or invent a
discount. STOP, or any request to stop, means mark do-not-contact permanently. OTHER means flag
it for me. Return a table.
```

Interested people reach the contractor as booked calls. That is the handoff that gets you paid.

6. STEP FOUR: REPORT

TURN THE SHEET INTO A TEN-SECOND REPORT

```
From this sheet: [PASTE]. Write the weekly report for [OWNER NAME] that he can read in ten
seconds. Counts for Contacted, Replied, Interested, Booked, Won. Dollars of work won this week.
The three names to call first. Plain text, no charts, under 80 words.
```

Track won jobs, not friendly replies. A message that earns "thanks!" and no callbacks gets deleted.

CONTACTED	REPLIED	INTERESTED	BOOKED	WON
50	*8*	*4*	*3*	*2*

Illustrative numbers from the video, not promises. Your real numbers will differ, and this report is how you find them.

7. AUTOMATE THE REST WITH CLAUDE

Everything else in this business follows one pattern: give Claude the raw material, tell it the job, review the result. Do anything twice and save the prompt.

PROSPECT RESEARCH

```
Research [COMPANY] before I message the owner. Summarize in 8 bullets: what jobs they sell, how big they are, review themes, how they handle quotes and follow-up (as far as it is publicly visible), and one specific thing to mention. Keep it factual and note anything you could not verify.
```

CALL PREP SHEET

```
I have a call with [OWNER NAME] of [COMPANY] about the pilot. Write a one-page prep sheet: three opening questions, the three likely objections with a short answer each, the pilot terms in one sentence, and the exact next step I will ask for.
```

ONBOARDING CHECKLIST

```
Turn these steps into a client onboarding checklist I can send to each new contractor: [PASTE YOUR STEPS]. Plain language, a deadline for each step, and what I need from him.
```

WEEKLY NOTE AND MONTHLY REMINDER

```
Write two short client messages from me to [OWNER NAME]: a weekly note that introduces this week's report in two sentences, and a monthly reminder that the pilot renews on [DATE]. Warm, direct, no fluff.
```

8. TEXTING RULES CHECKLIST

Keep the list clean and keep a record. Check the rules for your state and your carrier before you send anything.

- [ ] Only message people who requested the quote.
- [ ] Send as the contractor, in his name.
- [ ] Include an opt-out line ("Reply STOP") in the first message or as required.
- [ ] Honor every stop request immediately and permanently, and keep a record.
- [ ] Respect quiet hours in the customer's local time.
- [ ] Three messages maximum per person.
- [ ] Keep proof of the original quote request for each contact.
- [ ] Never offer or invent discounts. Price questions go to the owner.

9. YOUR FIRST 48 HOURS

- [ ] Pick one trade and one town.
- [ ] Use the target-list prompt to find fifty owners.
- [ ] Choose the ten you like best.
- [ ] Write your one-question opener.
- [ ] Send it to the ten.
- [ ] Offer the small test on quotes they approve.
- [ ] When one says yes, ask for the paid pilot.