

A GUIDE TO

CUSTOMER EXPERIENCE

How homeowners want to interact before, during, or after a job



 Housecall Pro

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SECTION ONE

Introduction

Not so long ago, creating a positive customer experience relied almost entirely on human interactions. It was up to technicians and office staff to represent the business and keep customers happy. And while these interactions are still extremely important, **today they are only part of the overall customer experience** which relies more and more heavily on technology.

As homeowners grow accustomed to modern conveniences like automatic payments and appointment updates, even small home service companies must learn how to use technology to make it easier for customers to do business with them. **A winning customer experience requires both: friendly and well-trained staff, and convenience-minded technology.**

In this guide, we look at **what matters to homeowners before, during, and after a service call.** These insights are supported by data from our most recent survey of over 400 homeowners. We also provide checklists and sample scripts for business owners, customer service representatives, and technicians to help you take stock of what you're currently doing and spot ways to quickly and easily improve the overall customer experience.

AFTER A GOOD EXPERIENCE WITH A HOME SERVICE COMPANY...

97%

Would be likely to recommend the business to their friends and family

82%

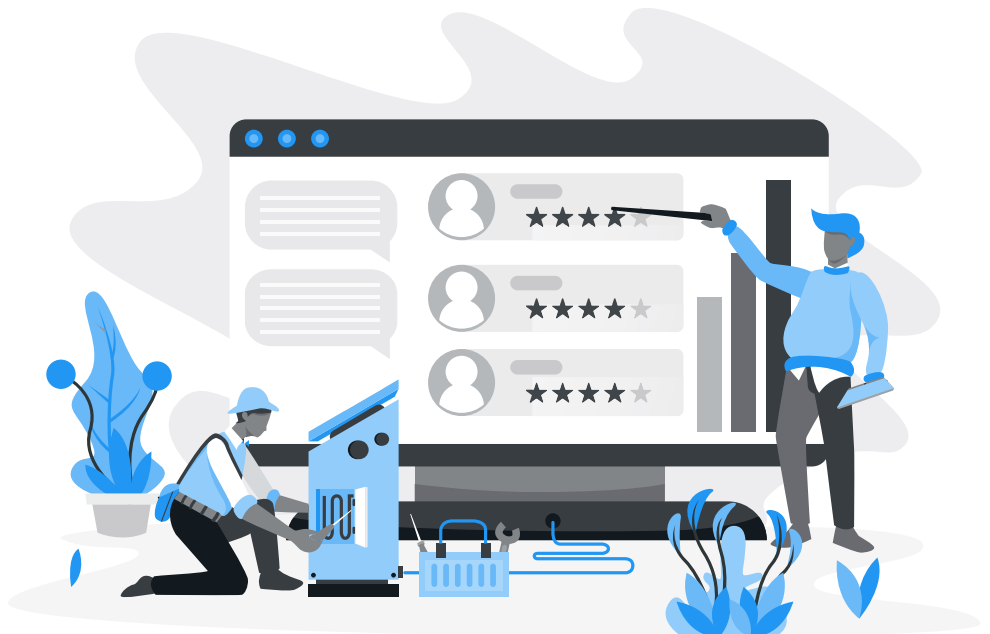
Would be likely to write an online review

73%

Would consider signing up for a recurring service plan

72%

Would be willing to sign up for ongoing promotional messages



Before the job

The customer experience starts before someone is even a customer. More and more individuals research companies before making contact making it very likely that their first impression with your company will be a what they find online.

THE STRATEGY

1 Talk about pricing without getting too specific

You don't need to go into detail about pricing. You can seem transparent about costs by explaining how you price your services. This can reassure potential customers about what to expect. Examples from our pros:

- *"We will visit your home and diagnose your problem. No hourly fees. We'll tell you how much your service will cost before we undertake any repairs, and your price will be based on a straightforward pricing list."*
- *"Our diagnostic fee includes the trip charge and the first 30 minutes of troubleshooting and diagnosis."*

[Clements Electric](#)

2 Make it easy for customers to get in touch and book their next appointment how they prefer

Are you making it difficult for customers to contact you in their preferred method? **You don't have to deprioritize the phone, but be sure it's not the only option available.** Promote other contact info to encourage potential clients to reach out how they are most comfortable. Also consider adding tools like [online booking](#) and **live chat** to **win over another 26-34% of customers** who prefer these means of communication and booking.

3 Utilize flowcharts with relevant questions for customer service reps

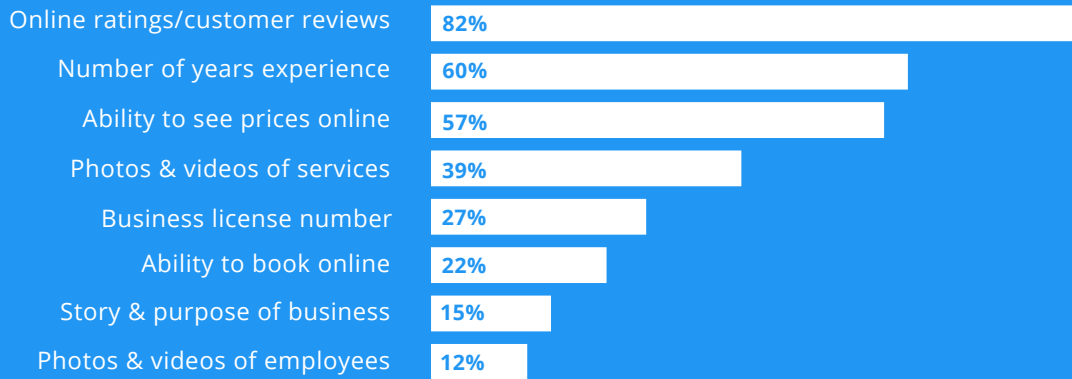
Create flowcharts of common customer requests that customer service reps can use on the call to make sure they don't miss anything. **Include the most helpful questions to give the best estimate for how long an appointment will take and financial estimate.** This will also help guarantee that the techs are prepared with all the information and tools they'll need for the job.

"Getting the right information is huge because it not only prepares the technician that's going to the job, but it builds trust with the homeowner from the beginning."

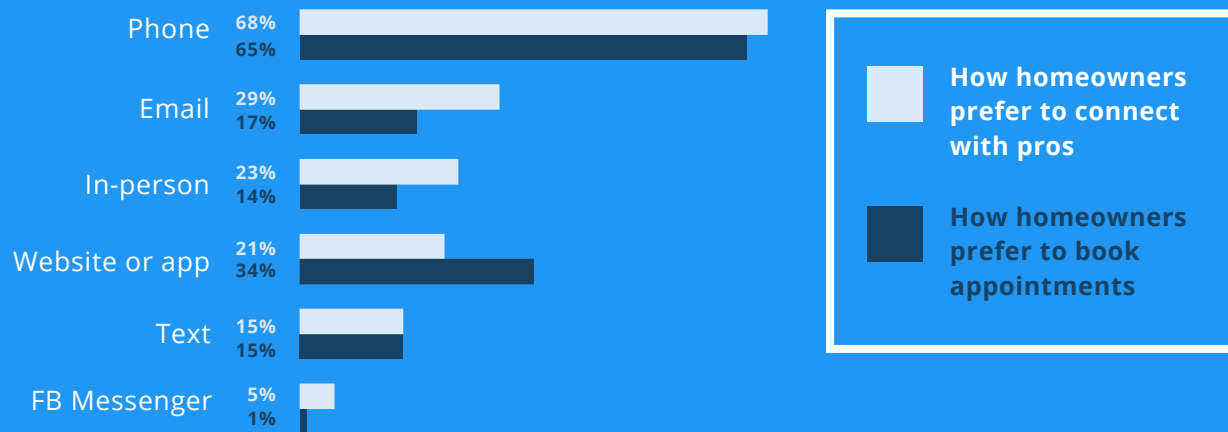
Courtney Skaggs, former office manager for a successful electrical contractor

THE DATA

Homeowners care most about reviews, years of experience, and pricing



Customers want to connect via phone, text, and email



Over half of all homeowners want appointment confirmations, one-day reminders and “On My Way” emails or texts.

PERCENTAGE OF WHAT HOMEOWNERS WANT

69%

An appointment confirmation text or email.

61%

“On My Way” email or text

56%

A day-prior notification



Automate appointment notifications

Save time by using Housecall Pro to [automatically send emails and text confirmations](#) of appointments, previous-day reminders, and “on my way” messages. When the job is completed, automatically send a text that includes job details with an option to securely pay online.

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During the job

Improving the customer experience during a home visit requires a mix of employee training and technology. **Technicians need training and practice honing communication skills, as well as accountability and incentives.** In addition, the proper technological resources can make it easier for them to deliver exceptional customer service.

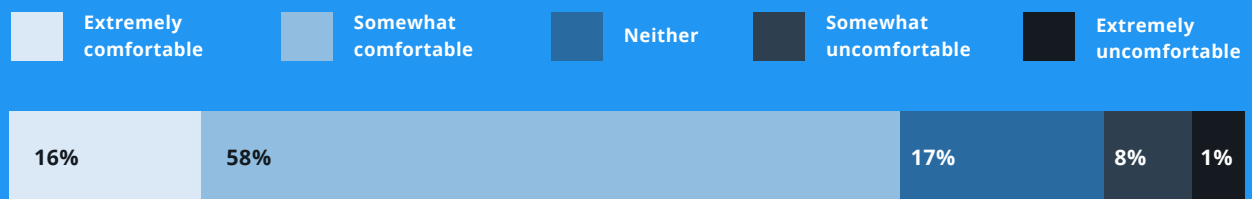
THE STRATEGY

- 1 Send info about tech prior to appointment**
 Seeing a picture or description of the technician prior to their arrival helps 83% of homeowners feel more comfortable.
- 2 Prepare techs to offer choices**
 Have resources sheets prepared for common larger jobs that outline and compare three different options. Utilize training and scripts to ensure techs know how to present these options and how to sell the customer on the best one for them and your company.

THE DATA

Over half of homeowners are only somewhat comfortable having a tech in their home

HOMEOWNERS COMFORT LEVEL HAVING A TECH IN THEIR HOME



60% Of homeowners see cleanliness as extremely or very important

HOW IMPORTANT IS THE HOMEOWNER'S PERCEPTION FOR CLEANLINESS OF THEIR TECHNICIAN'S UNIFORM?



87% of customers want a choice when presented with job estimate





Create estimates in the field

Using our [sales proposal tool](#), techs can build estimates on the fly. Present multiple options complete with details and pictures.

[BOOK FREE DEMO](#)

After the job

THE STRATEGY

1 Combine credit card reader, ACH and online payments for ultimate convenience

It's easier than ever for technicians to collect payment in the field with **mobile credit card readers and ACH processing**. Your customers will be happy, and you'll get your funds faster. **Everybody wins.**

When you're not able to collect payment right away, consider adding a link to an online payment option, such as PayPal, Venmo, or Apple Pay, on your invoices. It's a convenience that **8% of homeowners** polled prefer, and we suspect this number will grow.

2 Have techs lead review requests

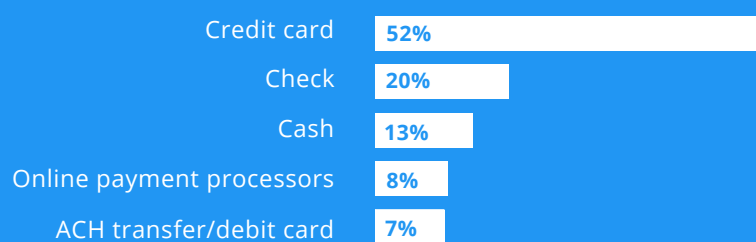
Juliette Riddle, former marketing director of a large plumbing, heating and cooling company, explained that the success rate of review completion was much higher when technicians **emailed the request personally**, as opposed to from office staff or a generic company email address.

On a service call, have technicians ask if a customer would feel comfortable leaving a review and let them know when to receive an email in the next few days. Follow up with a personal thank you for customers that follow-through with the review. Some of this can be done in the tech's name by office staff.

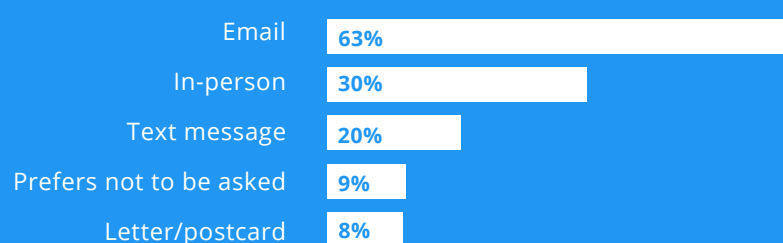
THE DATA



Over half of homeowners prefer to pay via credit card



63% of homeowners prefer review requests to be emailed to them





Keep top of mind with customers

Automatically [follow up with customers](#) after a job via email or a postcard.
Set your own rules for when and how your customers hear from you.

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Sample checklists and scripts

CUSTOMER EXPERIENCE CHECKLIST FOR OWNERS

BEFORE THE JOB

- Does your branding prioritize customer reviews?
- Do your business profiles mention your industry experience?
- Do your business profiles offer information about your pricing?
- Can homeowners get in touch via phone, email and text and is all contact info easy to find?
- Does your website answer your customer's most commonly asked questions?
- Are you sending appointment confirmations, one-day reminders and "on my way" emails or texts?
- Are you preparing your customers for their appointment with info about what to expect?

DURING THE JOB

- Are you offering your customers choices?
- How accurately do your estimates match the final invoice?
- Are you leaving something memorable and useful with the customer?
- Do your techs have easily accessible materials to educate customers?
- Are you using technology to ensure your techs give a consistent quality experience?
- Do your techs have time to practice scripts and other soft skills?
- Do you reward techs on receiving good reviews?
- Are you offering consumer financing?

AFTER THE JOB

- Are you giving customers the option of paper or email invoices and receipts?
- Do you accept credit cards?
- Are your techs asking for reviews?
- Do you follow up via text or email with a thank you and review reminder?
- Are you personally thanking customers who leave you a positive review?
- Do you send personal emails/gifts, etc for customers of your biggest jobs?
- Are you listening to what your employees say your customers want?
- Are you responding to reviews?
- Are you offering recurring service plans?
- Are you surveying your customers about their experience with your company and what additional offerings they'd like to see?

CUSTOMER EXPERIENCE CHECKLIST FOR CUSTOMER SERVICE REPRESENTATIVES

Your CSRs don't need to check off all of these. Mark ones you feel are important for your company and customers.

- Process to record customer info and easily input it into CRM
- Flowchart with questions to ask per scenario
- Scripts that match company goals/values
- Resources to send customers that explain what to expect in a home visit or relevant educational resources
- Resources to send techs to support them in the field
- Mechanism to record calls



SAMPLE PHONE SCRIPTS

Greeting: *Good morning/afternoon! This is [CSR's name]. How can [company] be of service to you today?*

Collect customer info: *Yes, we can certainly help you with that. I'm going to ask you a few questions so that we can serve you the best.*

Endings: *We're set for [day, time window] at [address]. All of our technicians are [qualifications], so you're in good hands. Can we thank anyone for referring you to us today?*

or

We're set for [day, time window] at [address]. You'll be receiving an email confirmation along with day-before reminder. In the email, I'll link to information about our monthly service agreement plan with which service calls like this one would be free of charge. If you're interested, [Technician] can answer all your questions about it.

HANGING A CHANDELIER

- HOW HIGH IS THE CEILING?
- WHAT IS THE SIZE AND WEIGHT OF THE CHANDELIER(S)?
- CAN YOU SEND THE PICTURES OF THE CHANDELIER, THE ROOM, AND ACCESS FOR A TALL LADDER?

YES

DO YOU KNOW THE SIZE AND WEIGHT OF THE CHANDELIER WE'LL BE REMOVING? ARE THERE CRYSTALS OR DELICATE PIECES WE'LL NEED TO BE CAREFUL TO PROTECT?

NO

THERE MAY NOT BE POWER NEAR THE LOCATION. DO YOU KNOW WHERE THE NEAREST POWER IS TO THE PULL FROM AND WHERE THE SWITCH SHOULD BE LOCATED?

ADDING LIGHTS TO A LIVING ROOM

- IS THE CEILING SLOPED OR FLAT?
- WHAT IS THE CEILING HEIGHT?
- IS THERE ATTIC ACCESS?
- HOW MANY LIGHTS, SIZE, AND KELVIN RATING PREFERENCES?
- WOULD YOU LIKE ANY OF THE CANS TO BE ADJUSTABLE? (UPSELL OPPORTUNITY)
- IS THERE EXISTING POWER IN THE CEILING WITH A SWITCH?

YES

DO YOU KNOW THE SIZE AND WEIGHT OF THE CHANDELIER WE'LL BE REMOVING? ARE THERE CRYSTALS OR DELICATE PIECES WE'LL NEED TO BE CAREFUL TO PROTECT?

NO

THERE MAY NOT BE POWER NEAR THE LOCATION. DO YOU KNOW WHERE THE NEAREST POWER IS TO THE PULL FROM AND WHERE THE SWITCH SHOULD BE LOCATED?

CUSTOMER EXPERIENCE CHECKLIST FOR TECHS

Your CSRs don't need to check off all of these. Mark ones you feel are important for your company and customers.

- Kit in car with spot wipes for stains, breath mints, etc to preserve uniform and appearance
- Scripts to explain what you'll be doing
- Educational materials to support you
- A list of tips, how-tos, etc to offer additional value to your customers
- Business cards or other materials with your name and contact info
- Tool to prepare or alter estimate in the field
- Scripts to explain financing options
- Scripts to sell service agreements, upsells
- Knowledge of company's specials
- Tool to take photos/videos of the job (with customer permission)
- Script for review request

SCRIPTS

Bringing up recurring service agreements:

I'd really like to help you get the most out of this [repair, install, etc]. It can usually costs around [\$] when your [equipment] breaks down. But with our service agreement plan, you'll only spend [\$ per month/quarter/year] to have us out and prevent these kinds of issues. We'll also [services included]. Besides [main benefit], but all subscribers [additional benefits].

Asking for a review:

[Customer name], it was a pleasure serving you today. If you were satisfied with my work, it would mean a lot to me if you could leave a review of me and [company]. We'll send you a text/email to make it easy for you. Here is my contact info if anything else comes up that you need help with.

Where to go from here

Our checklists and scripts can help you get a sense of what you can add or improve to boost sales and improve the overall customer experience. From here, we recommend looking into customer service and sales training programs that can more personalized and involved industry-specific help. Here are some of the programs our pros have had success with:

- [High Growth Coach](#)
- [Power Selling Pros](#)
- [The Service Profit Group](#)



From a one-time job to a longtime relationship

Housecall Pro's full-service platform is packed with features to enhance the customer experience while helping you save time and grow your business.

Impress Your Customers

Features like "on my way" texts and on-the-spot estimates enhance the customer experience.

Keep Your Customers

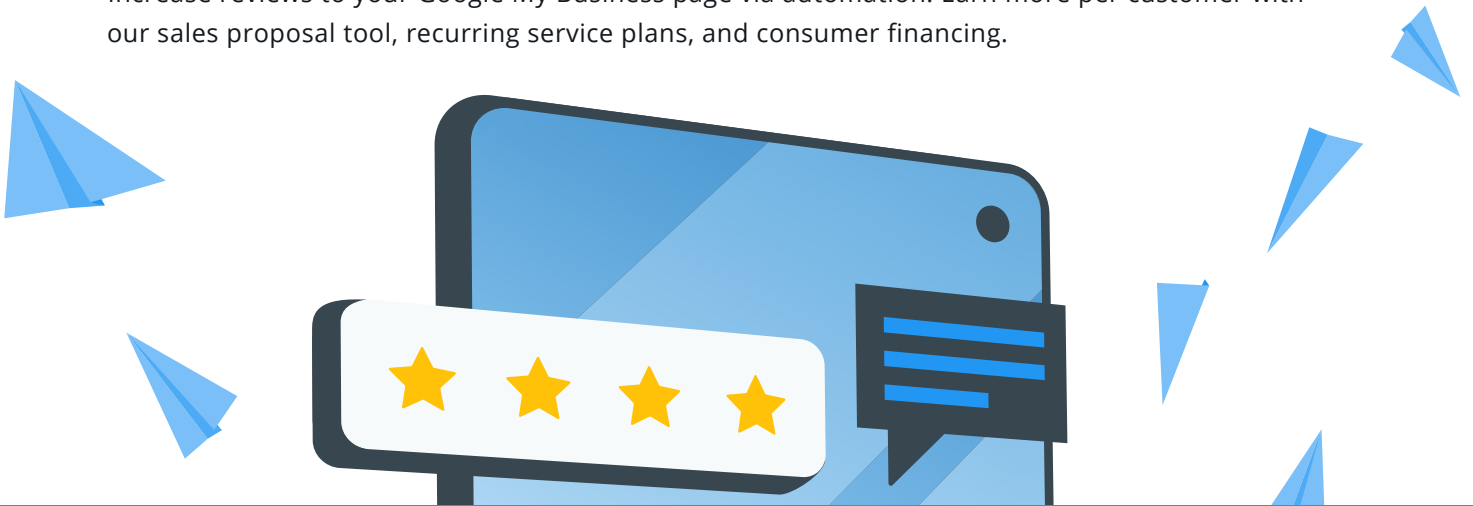
Our follow-up marketing tools will help you stay top-of-mind after a job.

Save Time

You can save over 10 hours a week by automating your company's scheduling, dispatching, estimates and invoicing.

Grow Your Business

Increase reviews to your Google My Business page via automation. Earn more per customer with our sales proposal tool, recurring service plans, and consumer financing.



We've helped tens of thousands of businesses thrive. Let us help yours.

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