

90-DAY PLAYBOOK

FOR HOME SERVICE BUSINESSES



LEARN HOW TO SPEND YOUR LOANS EFFICIENTLY AND
SET YOUR BUSINESS UP FOR SUCCESS DURING AND
AFTER THE COVID-19 PANDEMIC.

 Housecall Pro

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This playbook is all about how to take action now, and when it comes down to it, that's the most important takeaway of all. **You must act now.**

If you're paralyzed by fear and sitting tight, it will be the end of your business. And if you want to thrive when the economy bounces back, you have to start gaining momentum now. Remember that demand doesn't disappear. The crisis creates a bottleneck. At some point, there will be an influx of opportunities that you'll want to be in the best possible position to seize.

Even now, in the middle of the crisis, we're seeing many pros using gumption and creativity to find immediate opportunities to bring in new sources of revenue. So take any small steps you can today and use this guide to help you create a larger plan of action for the next 90-days and beyond.

Enhance your perspective

“Times like these are the perfect times to try things that are uncomfortable because that’s the right growth mindset and will lead to the results that you’re looking for coming out of this situation that we’re all in.”

Roland Ligtenberg, Co-Founder and SVP of Growth and Innovation at Housecall Pro

CREATE A CULTURE OF SURVIVAL AND SUCCESS

It doesn’t matter if you’re a one-person shop or you have twenty people under you, you’re the one creating the mindset of business. This mindset affects everything you do and everyone involved. To create this culture:

- Focus on what you can control.
- Keep oriented toward the future.

INVEST IN YOURSELF AS A LEADER

What are you doing to invest in yourself? As Tony Robbins would say, “feed your mind.” Invest in your leadership skills every day because you need them now more than ever. Your family, your company, your community depend on them. Set time aside daily to feed your mind and your spirit. Here are some podcasts to get you started:

- General business and life advice:
 - [Tony Robbins](#)
 - [Cardone Zone Podcast](#)
 - [Dave Asprey Podcast](#)
 - [10X Talk](#)
 - [The Tim Ferriss Show](#)
- Leadership:
 - [EntreLeadership](#)
 - [WorkLife with Adam Grant](#)
- Inspirational business stories:
 - [NPR’s How I Built This](#)
 - [Masters of Scale](#)

TAKE YOUR BUSINESS’S PULSE

We’re going to take you through how to look at your finances, operations, sales and marketing over the next ninety days. With each action you take, you need to decide how aggressively you can approach it based on whether you’re:

- Struggling (survival mode)
- Treading water (stay mode)
- Opportunistic (grow mode)

Get organized

“Control what you can control. The government and their decisions influence you, but they are out of your reach. What you do have control of is what you decide to do, today; the actions you take to move your business forward. It’s a hundred mile race to get back to thriving— what does the next mile look like for you?”

Brooks Pettus, COO of Housecall Pro

FINANCES

Step 01: Assess where you’re at

Take an inventory of your finances:

- Run your Profit and Loss (P&L) report
- Run reports on the current health of your business, including debt to asset ratio, accounts receivable, net profit margin, and net cash flow

These reports establish your baseline. They can tell you exactly how much cash you’d need to keep going if your business shuts down completely or runs at half-capacity. They’ll also tell you how attractive you’ll be to lenders if you need to take out new forms of credit. [Learn more about these reports here.](#)

Step 02: Get lean

Look at all the expenses on your P&L over a two week period, line by line, and cut anything that’s not critical to making money. What is a “must-have” to drive revenue in your business and what is a “nice-to-have”?

Step 03: Secure cash

Ideally, you want cash reserves on your books for future opportunities.

- Run your Profit and Loss (P&L) report
- Look into the federal programs first: [Economic Injury Disaster Loans \(EIDL\)](#) and the [Paycheck Protection Program \(PPP\)](#) which have better terms than private credit sources.
- Have a contingency plan if these loans don’t come through. [Check out alternative lending sources](#) that can offer fast decisions and access to funds.

Step 04: Create cashflow and repayment plans

If you’ve taken out EIDL and PPP loans, have a plan in place on how to repay them. Set up separate accounts for your new funding. These crisis loans (especially the PPP program) require meticulous records about how the funds were used, so you’ll want to keep very good track of the money in and where it goes.

It’s also important to know how to keep cash on hand right now. Cash will keep your business going. If less money is coming in, see what you can do about money going out. Many banks are working with companies to delay loan payments, account fees, etc. Work with your bank to keep cash in your accounts.



PEOPLE

- Step 05: Update your team**
Be transparent about what's going on with the company. Inspire confidence in your team by telling them your plans for the future.
- Step 06: Get creative with responsibilities**
If you don't have enough work for your team right now, look for ways to invest in the future: sales or other online training programs, volunteer opportunities, cleaning and warehouse duties. Collect ideas from your team, as well.
 - **Bonus:** If you haven't already applied for the PPP, consider hiring contractors as regular employees.

OPERATIONS

- Step 07: Add adjacencies**
Consider work you might not have done before but can do now to bring in extra revenue.

PRO SPOTLIGHT

[Lawanda Haney, owner of Fit for Cleaning](#), is using her wholesale janitorial supply connection to create, sell, and deliver care packages with products like hand sanitizer and toilet paper that people in her community are having a hard time finding.

- Step 08: Add new services**
Consider new product offerings that work in the current environment and in the recovery stage.

PRO SPOTLIGHT

[Family Man Handyman](#) expanded its leak detection services beyond just roof leaks and will now assess appliance or other possible household leaks.

- Step 09: Offer virtual estimates**
Provide safe, fast estimates using phone calls and video tools to connect with your customers and confirm a job. [Read our best practices about offering virtual estimates.](#)

Revamp your sales and marketing strategies

"You're sowing your future success right now. It's ground that you've cultivated by building your reputation and showing profound care in these turbulent times. If your customer isn't a buyer now, they will be at some point when the economy bounces back."

Brooks Pettus, COO of Housecall Pro

Across the board, our advice is to not put all of your eggs in one basket. This is true about where you invest your marketing dollars or your time, what customers you go after, what services you're featuring. The key to success is diversification.

Depending on whether you're in survival mode or growth mode, you may need to focus more on free and low-cost initiatives. The next five steps are free and everyone should be doing them. If you have the means, adding paid strategies will help you gain momentum (and many of them are cheaper than normal, so it doesn't take a huge budget to do this.)

MESSAGE



Step 10: Revise your message

The messaging you had a month or two ago may not be relevant anymore. Your customers' circumstances and mindset have changed. Your messaging should be:

EMPATHETIC

"We understand this is a hard time for you, and this is how we can help."

Brandon Medcalf, owner of Medcalf Mechanical is offering zero interest, zero payment financing for twelve months which has been popular and is easing customer's fears.

AUTHORITATIVE

"We have safety protocols in place to keep you safe. We can also help if you need emergency services."

Sarah Hughton, the owner of Golden Rule Cleaning & More, is preparing a new message as businesses reopen in Illinois to explain that, "cleaning is not a luxury anymore, it's a public safety issue."

INFORMATIVE

"We have answers to your questions."

Be clear about what service options you have available now and will in the near-term.

CUSTOMERS

Now that you have your message, it's time to reach out to your existing customers while also doing everything you can to find new audiences, both now and when the economy bounces back.

- Step 11: Contact your existing customers en masse**
Email your customers with your newly revised message. What are the ways that you're adding new value to them? New services they may need immediately or new financial offerings to help them long-term.
- Step 12: Follow-up individually**
This is the cheapest and most effective advertising you can do right now. Roland recommends picking up the phone and calling each customer to check-in, make sure they're doing okay, and see if there's anything they need. You aren't selling, you are investing in the future and showing care. If you have employees sitting around, you can divvy up your customer list for them to contact.
- Step 13: Brainstorm new customer bases**
Now is the time to go after new audiences. Who is still working right now and who will need help in the recovery period?

Brandon has been surprised who is reaching out to his business for work. He recently installed a new air conditioning unit to a blood bank that is open longer hours due to blood shortages. He's also getting work from factories and senior care facilities — all businesses that are considered critical right now. Service work like AC that might not have been as much of a priority in the past is now considered vital to keep people comfortable and healthy.

PROMOTION

- Step 14: Dig into free marketing channels**
 - [Go live on Facebook.](#)
 - Look for community service projects.
 - Partner up with other local businesses to promote each other.
 - Work out deals with your competitors who may be struggling and service their business on a revenue share or have them come to you.

PRO SPOTLIGHT

[John Cipres, the owner of Andreas Fault Property Services.](#) is reaching out to podcast hosts to ask if he can be a guest on the show. In a webinar, he told us he'd been on three podcasts in the past week, which gets his name out there to listeners.

- Step 15: Try out new paid channels**
 - Advertising rates are much lower than normal, so try out new marketing channels, such as AdWords, radio or television ads, etc.
 - Focus on-brand messaging. Getting in front of new eyes doesn't necessarily lead to immediate jobs, but awareness of your company will build up over time. When you're empathetic and informative, people are going to remember you months from now when it comes time for them to call someone.
- Step 16: Track everything**
Even if it's on pen and paper or a simple spreadsheet, every dollar you spend on marketing should be tracked and measured
 - How many leads, estimates, and jobs does a marketing channel bring in a week?
 - What did you spend per lead?
 - What did you make on each job?
 - What kinds of jobs are you getting per marketing source?

Double down on what's working and watch closely to see when it stops being as effective. You'll want to act faster than normal. Things are changing at a faster rate than usual and you likely have a smaller marketing budget, so make each dollar count.

Our top coronavirus resources for home service businesses

- Stay informed with our **Home Services Evening Update** webinar happening every day **Monday–Thursday at 5 pm PT/8pm ET**. [Register here.](#)
- Connect with other pros in the **Official Coronavirus Facebook Group for Home Service Businesses**. [Join the Facebook group here.](#)
- Watch our **Pro Talk Podcast** for special interviews with pros from a variety of industries to learn how they're handling the crisis in different ways. [Watch episodes here.](#)
- For more resources, [find all of our coronavirus-related resources here.](#)





Customizable “on my way” texts

Before a service job, it’s important to communicate with your customers about what might be out of the norm, such as how you’ll be social distancing or sanitization practices you’ll be using.

[Automatically send texts to your customers](#) when you’re on your way and share this information so they know what to expect.



Easy work for you and the customer

Handling cash and paperwork can increase your employees' risk of exposure to the virus. The safest and most reliable way to get paid is through credit cards and ACH. Housecall Pro can [automatically send an invoice](#) when a tech finishes a job and allow you to take payments online.