

Unlock the Power of Your Business: Action Plan

LEADS

First, take a look at your numbers

- What is your inbound lead volume?
- What percent of your leads are converting to booked jobs?
- How much in unsold estimates is listed on your follow-up tab in the past 30-60-90 days?
- How many maintenance visits are you able to schedule? How long does it take your CSRs to schedule?
- How many reviews do you currently have and how do you compare to your closest competitors?
- What is the true ROI of your Google Ad campaigns? Are you or your agency able to tie each campaign to jobs and revenue or just to calls?

Opportunities

- Automate your follow-up process. Go after every unsold estimate with automated emails.
- Schedule your maintenance appointments automatically.
- Automate your review request process and respond to every positive and negative review.
- Clean up your marketing data. Set up accurate, reliable marketing attribution so you get better insights into where you should focus.
- If you are spending on Google Ads, identify campaigns that are generating revenue and check true ROI. Spend your marketing budget wisely!

What are your marketing goals?

First, take a look at your numbers

- What is your website's booked job conversion rate?
- How many impressions does your Google Business Profile get, and what is the conversion rate?
- How many inbound inquiries does your Customer Service team receive daily?
- What is your call abandonment rate?
- How many unbooked calls? What % are after hours?
- What is your average call on-hold time?
- What percent of leads are unconverted?

Opportunities

- ❑ Include multiple ways a customer can get in touch on your website (online booking, live chat, click-to-call). Be sure these all have clear CTAs and are easy to locate on each page.
- ❑ Keep your Google Business Profile up-to-date to rank higher and stand out from the competition. Include a "Book Now" option so customers can easily schedule an appointment directly on Google.
- ❑ Explore scaling support with flexible third-party solutions that can handle fluctuating volume after hours and during busy seasons.

What are your job booking goals?

TECHNICIAN ASSIGNMENT

First, take a look at your numbers

- What is your technician lead turnover rate?
- What is your technician close rate?
- What is your technician average ticket?
- What are your close rates by job type?
- Average ticket by job type

Opportunities

- Use the right job types in your reporting to measure performance
- Create a batting order of technicians to prioritize based on your job types
- Use technician skills, shifts, performance, and zones to better manage how you assign technicians
- Utilize technician shifts for an effective schedule on the Dispatch Board

What are your dispatching goals?

First, take a look at your numbers

- How often are your technicians presenting estimates to customers?
- How often are your technicians presenting estimates with financing?
- What is your average ticket size?
- What is your close rate when financing is offered?
- What is your close rate when financing is not offered?
- What are your individual technician close rates?

Opportunities

- ❑ Train your technicians to quote with confidence with estimate templates and financing offers.
- ❑ Control your profits with custom rules to decide which plans are offered to your customers based on your business goals.
- ❑ Boost your customer's purchasing power by offering financing on every estimate sent, so they can apply online, anytime and get instant approval.
- ❑ Offer more plan options from multiple providers to your customers so they can choose the plan that best fits their financial circumstances.

What are your sales goals?

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