

# THE ULTIMATE HOME SERVICE CHECKLIST

Four Steps for Converting Everyday Appointments  
into Five-Star Reviews... and Loyal Customers



## INTRODUCTION

When it comes to the home services, what goes into a “five-star” experience for the homeowner?

Prompt service? Effective repairs? Fair prices? Sure, all of these things are essential to “good” customer service in our industry—but what about GREAT service? The kind of experience that makes a homeowner go “Whoa! From now on, this is my company”?

You already have some idea about how important these kinds of experiences are for your business. In fact, the Gartner Group found that that 20% of a business’ existing (repeat) customers generate 80% of its profits. That’s a lot.

On top of that, it’s reported that up to 87% of consumers said they’ll seek out a businesses’ competitor after just **a single** bad experience. Yikes.

At **ServiceTitan**, we’re constantly looking into what constitutes an uncommonly good homeowner experience. That means we’ve spent a lot of time consulting with experienced trade professionals to learn what technicians can do surpass homeowner expectations, generate word-of-mouth, and help their businesses expand their customer base.

And we’ve compiled everything we’ve found out right here in this document: **The Ultimate Home Service Checklist**.

In this easy-to-reference guide, we’ve distilled everything we’ve learned about the home service job cycle and the ways businesses and their technicians can ensure the kind of customer experience that can turn your next call into a lifelong customer.

No two home service shops are alike, but whether you’re looking to retool your customer service practices or simply keep a guide on hand to help train new techs on principles you already use, ServiceTitan is here to help.

So let’s get started!

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## BEFORE ENTERING THE HOME

Success is about preparation, right? So before your technicians even exit their trucks, what have they (and other members of your team) done to ensure that the next job is teed up for maximum success? Let's take a look at some of the proactive ways high-functioning shops ensure every tech is ready to put their best foot forward.

Before entering the home, your techs should:

- ☐ **Review homeowner and property information.**  
Sure, your tech has their address in hand, but what else do they know about the customer before showing up on their doorstep? Is there a door code? A pet on the premises? Children in the home? Details matter.
- ☐ **Know the service history.**  
Even more important than homeowner personal information is their service history with your company. The last thing you want to do is offer a high ticket product or service to a customer who already recently purchased it from you (especially if that high ticket product is causing any issues).
- ☐ **Leave "zero footprint."**  
Like, literally. Make sure your techs are supplied with booties to cover their tracks as they make their way in and out of your customer's homes.

## UPON ENTERING THE HOME

Time to make a first impression with the homeowner. At the start of a job cycle, customers can be anxious, annoyed, frustrated—experiencing a whole range of different emotions. That's why it's critical your techs use their expertise and interpersonal skills to put homeowners at ease.

Upon entering the home, your techs should:

- ☐ **Prove who they are.**  
Being welcomed into a customer's home is a privilege, so your techs should be kick-off the process with a friendly smile and an I.D. of some kind.

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## UPON ENTERING THE HOME (CONT.)

### ☐ **Confirm the apparent problem.**

Homeowners don't want techs showing up who seem unprepared to handle the problem. Train techs to use on-hand job info to be proactive and confirm the issue upon meeting the homeowner.

### ☐ **Ask questions.**

Once the reason for the visit is confirmed, techs should be asking open-ended follow-up questions like "When did this start happening?" or "Tell me more...". Not only can this uncover important details for determining a solution, it also assures the homeowner that the tech is engaged and knowledgeable.

### ☐ **Be Personable.**

No tech is there to become best friends with the homeowner, but if conversation allows, they should be friendly and search for a personal connection. Humanizing the reason for the visit can help put all parties at ease.

## DURING THE INSPECTION

With introductions out of the way, it's time for your tech to determine what the actual issue is. Sometimes a homeowner is present for this process, sometimes not—but either way, there are ways your tech can ensure the best customer experience possible.

During the inspection, your techs should:

### ☐ **Be respectful of the customer's property.**

It's not uncommon for techs to need to move furniture (or other items) or take things apart to diagnose an issue. Keep homeowners in the loop during this process, ask permission if they're present, and handle with care.

### ☐ **Document the scene.**

Especially if the homeowner isn't present. Having photos is not only important for liability reasons, but it also helps your tech explain what's actually wrong when consulting with the homeowner.

### ☐ **Stick to layman's terms.**

Just because a customer owns a home doesn't mean they know how it works and confronting a problem can make them anxious. When explaining problems and solutions, techs should keep things simple and use metaphors when necessary, so customers stay informed.

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## MAKING THE SALE

Your tech made a good first impression, inspected the property, and determined the problem. Now it's time to offer the customer possible remedies... and make a sale. Neither your tech nor the homeowner wants a sweaty, high-pressure sales situation, so let's take a look at ways to make this process easier for both parties.

When making recommendations, your techs should:

- ☐ **Present options.**

Homeowners want issues taken care of, but usually, don't like being told what they need to buy. Instead, when possible, present customers with options that mix "basic" offerings with "premium" ones.

- ☐ **Exercise their expertise.**

Not all techs are comfortable "salespeople," but they should all be comfortable making certain recommendations or sharing their experience with certain products. Homeowners won't mind the advice—especially if they already trust your tech.

## FOLLOWING UP

Many jobs—for one reason or another—require more than one trip to the same house. Fortunately, there are ways your techs can continue to build a rapport with the homeowner, foster trust, and ultimately inspire loyalty to your shop.

When following up, your company should:

- ☐ **Try to assign the same tech.**

Multiple appointments are never ideal for the homeowner, especially if they feel they need to re-explain an issue or acclimate to a new visitor in their home. Instead, try to keep the same tech on the follow-up visits—customers will appreciate the continuity of service.

- ☐ **Review the previous visit.**

If the last visit was properly documented, your team has a lot of valuable information on the property and the homeowner. Have techs review that data before ringing their doorbell again so they're prepped to provide five-star service.



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## FOLLOWING UP (CONT.)

### ☐ **Never assume.**

Train your techs to ask follow up questions about the homeowner's issue and how its affected their day-to-day. Circumstances may have changed in-between appointments and homeowners will appreciate the check-in.

## WRAPPING IT ALL UP

When it comes to the kind of customer service homeowners will want to experience again and again, the small stuff matters. The things that may seem inconsequential to an actual install or repair (like using booties, providing I.D., asking questions etc.) are often the unexpected touches that make the appointment experience memorable for the homeowner.

What is your shop doing stay on top of homeowner expectations? What customer service features distinguish your business from competitors? What small details are you executing to let homeowners know they've picked the right company?

These are the questions today's home service shops need to be asking themselves in today's highly personalized and technology-driven marketplace. And the better answers your business has, the more likely it is that you're setting your community's standard for five-star customer service.

Did we miss anything? Let us know. Send an email to [marketing@servicetitan.com](mailto:marketing@servicetitan.com)

## HOW SERVICETITAN CAN HELP

For nearly a decade, [ServiceTitan](#) has been helping modern home service businesses provide an elevated level of customer service to today's homeowners. Our award-winning, cloud-based software solutions are positioned to assist your team with every step of the job cycle from booking incoming calls to mobile-enabled payment capture.

For more information on how ServiceTitan can help bring you customer service that goes above and beyond homeowner expectations, contact our team today to [Book a Demo](#).