

THE HOMEOWNER EXPERIENCE CHECKLIST

Check all the marketing components needed for a successful Homeowner Experience!
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SALE STAGE

SOURCING

Website: Secure site (SSL), mobile optimized, good web speed, image tags, bullets & short sentences; Google Analytics, videos and images, easy navigation.

Social Media: Consistent posting, use #s, tag brands, include Google My Business in posts, increase Followers—don't get hung up on lack of likes or shares, engagement = >3sec view.

Online Search: Make sure the Homeowner can find you with relevant "layman's terms" in keyword searches in Google, Social Media (including #s), online profiles & directories.

Communication: Include ALL forms of communication: Phone, Text, Chat, Email, Facetime, Forms (include photo uploads), Messenger. Include in Email signature: links, certifications, state licenses, photo, best form of contact, best time to contact - RESPOND W/IN 24-48 hrs.

Word of Mouth/Reviews: Reply to all - negative & positive. Ask someone to read your reply before posting - remember the 3rd party! Post reviews on website—good for SEO.

Advertising: Be the Expert-Tips! Social Media, Videos, Project Pics, Blogs, Home Service Directories

FOLLOW UP/LEAD CHASER

Multi-touch: Automate schedule for follow-ups: 3x within 10 days, 30, 90, 6mo, 12mo

Get Information & Give Options: I'm Ready, Not Now, Thanks Anyway. Use forms to qualify leads and direct to designated team member to follow up in a timely manner.

SERVICE STAGE

INTERNAL COMMUNICATIONS

Client Discovery: Meeting between Sales and Service to share customer profile.

BUILD RELATIONSHIPS

Customer Communications: Introduction/Recap/Project highlights, timelines, expectations, point of contact, communication options, request their PREFERRED means of communication.

APPOINTMENT REMINDERS

Automatic Personalized Reminders: Schedule 5 days & 1 day prior with Team Member name, photo, time frame and option to reschedule via button link and/or phone call.

Designated Service Team Member: Manage schedule for any schedule changes and communication between Service Team and Homeowner.

REFER STAGE



REPUTATION MANAGEMENT PROCESS

Before Leaving: Just like other REQUIRED processes, Team Members MUST: clean up, take after photos, ask Homeowner if they are SATISFIED, review instructions/recap, leave behind contact information, testimonial sources/links, say “THANK YOU FOR YOUR BUSINESS!”



TESTIMONIAL NUDGE

Homeowner: Immediately (if possible) or within 24 hours SEND/CALL with another THANKS, recap/follow-up communication, including testimonial sources/links (with photo upload).
Technicians: Offer easy form submission including project overview, brand name, fuel type, customer’s town, photos/videos (without Homeowner personal items) to share on website.



REFERRAL PROGRAM

Social Media: Request “recommendation” on Facebook with YOUR COMPANY TAGGED@.
Monthly Drawing (Homeowners & Team Members): Shares, referrals, mentions.
Home Improvement Party: Request Homeowner host an on-site “infomercial” with friends to show off new project with your Team Member for tips, questions and special offers.

REPEAT STAGE



CUSTOMER LISTS & TAGGING

Customer Update Program: Request updated contact info annually from customer.
Tag Everything: Include in customer list: type of sale/service, fuel, age of building, where installation/service was performed inside/outside building.



POST SALE CROSS MARKETING

Repeat & Up-Selling: Based on tags, select customers who would be interested in future promotions, products/services offered that they may also be interested in purchasing.
Respark Relationship: Touch base at anniversary of completed project or during holidays requesting updated photos and testimonial—stay in forefront for repeat or referral sales.



TARGET AUDIENCE & ROI

SnapShot: Evaluate customer list to find more new customers JUST LIKE your best customers!
Radius Mailings: Based on recent installs/service, send direct mail and/or google advertising around customer addresses.
Google & Social Ads: Create audiences using best customer list information: demographics, behaviors, interests, geography.

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