

CUSTOMER JOURNEY SOP

How to design every touchpoint before, during, and after the job so customers come back, refer their neighbors, and pay premium prices

WHO THIS IS FOR

Home service operators who close the sale and then go silent, who run great jobs and still lose customers to the next contractor's mailer, and who know "customer experience" matters but cannot point to the SOPs that produce it.

WHAT YOU GET

A three-phase journey map (before, during, after), the named touchpoints top operators use to justify charging more than competitors, the in-field upsell trigger that captures revenue at peak trust, a warranty conversation script, and a 30/60/90 day follow-up sequence that earns repeat work without ad spend.

BASED ON

Field research across 200+ home service operators, including multi-location garage door franchises, lawn care operators, answering services, digital strategists, and behavioral-science researchers. Every script, sequence, and touchpoint here comes from an operator who runs it.

WHY THE JOURNEY IS THE ONLY DURABLE ADVANTAGE

The operator who scaled a garage door franchise from 28 employees to over 200 names the competitive advantage in one sentence. "Our customer-facing competitive advantage is not price. It is the intake and communication experience: how we answer the phone, the technology that sends a photo of the technician before arrival, and the warranty backup." Customers say "you guys aren't the cheapest, but..." and then list the touchpoints.

At the brand level, the case is even clearer. Consistency beats quality as a customer retention driver. Customers do not choose a national coffee chain because it is the best coffee. They choose it because they always know exactly what to expect. Home service operators who let every tech arrive differently destroy the predictability that turns one-time callers into loyal customers.

The structural omission is well-documented. The customer journey has three distinct phases: pre, during, and post. The most overlooked phase is "after the sale." Even the most sophisticated marketers underinvest in post-service follow-up relative to acquisition spend. The math is brutal on that omission. It costs ten times more to acquire a new customer than to retain an existing one. That is the core retention-vs-acquisition argument.

This SOP designs the three phases. The Lead Response Playbook covers what happens before the appointment is booked. The CRM Guide builds the system architecture. This is the touchpoint-by-touchpoint design that customers actually feel.

PHASE 1: BEFORE THE JOB (BOOKING CONFIRMED TO TECH IN DRIVEWAY)

The window between "appointment booked" and "tech rings the doorbell" is the highest-anxiety stretch in the customer's journey. They have committed money, time, and access to their home to a person they have not met. Most operators do nothing in this window. The operators who fill it with the right touchpoints earn the trust that everything downstream depends on.

TOUCHPOINT 1: AUTOMATED APPOINTMENT CONFIRMATION

The booking confirmation fires immediately. Email and text both. Date, window, technician name if assigned, total cost expectation if known, and a reschedule link in case anything changes on the customer's side. This is the floor, not the ceiling. Most operators do this and stop.

TOUCHPOINT 2: THE PRE-ARRIVAL TECH PHOTO

This is one of the three differentiators top operators name most often. Before the technician arrives, the customer gets a text with the tech's name, photo, and short bio. Sometimes a one-line note about the tech's specialty or how long they have been with the company.

The mechanism is precise: the "Uber-style pre-arrival bio text" shifts the technician from "stranger entering my home" to "known, vetted person I'm expecting." The customer's guard drops before the doorbell rings. They are more open to conversation, more willing to engage on options, less defensive about price.

From the customer side, the bar is remarkably low. Just showing up on time, sending a pre-arrival text, wearing a uniform, carrying an iPad, and delivering a professional proposal already puts an operator in the top 1% of their market, because the baseline standard of the competition is so low.

TOUCHPOINT 3: GPS TRACKING AND ON-TIME ARRIVAL

The customer gets a live ETA the moment the tech is dispatched. The text says "your technician is 12 minutes away" and updates if traffic shifts. This is table stakes for any company running a modern field service platform. If you are not doing it, your CRM is misconfigured, not your operations.

On-time arrival rate is not just a customer-experience number. Top operators track it as an operational metric tied to revenue capacity. Late arrivals trigger cancellations. One multi-location franchise cut its warehouse load time from 1 hour 33 minutes to 23 minutes and got back over an hour of billable field time per technician per day. On-time is a system, not a habit.

TOUCHPOINT 4: PRE-VISIT MINDSET PRIMING

This is grounded in behavioral science. A pre-visit text can include a commitment question or image that reshapes the customer's mental state while they are still in a neutral or positive frame. A well-known grocery-store study found that asking "are you adventurous or not?" causes 100% of respondents to self-identify with the positive trait. That self-identification then governs their subsequent behavior, making them more likely to say yes to a related request 20 minutes later.

For home service, a soft pre-arrival prompt works the same way. A simple "do you want the tech to also take a look at anything else while he is there?" message before arrival opens the door to in-field upsells without making them feel like a sales pitch later. The customer raised the topic. The tech is responding.

PHASE 2: DURING THE JOB (DOORBELL TO CLEAN-UP)

The 30 to 60 seconds after the doorbell rings is the most important window of the entire visit. The principle that 90% of a call's outcome is decided in the first 30 to 50 seconds applies to the technician in the home in the same way. If the tech has not made the customer feel understood,

cared about, and reassured in the first couple of minutes inside the house, every interaction after is working uphill.

TOUCHPOINT 5: THE DOORSTEP INTRODUCTION

Standardize it. The tech introduces themselves by first name. Confirms the customer's name. Restates the problem in the customer's own words. (Those words came from the CSR's intake notes, written down verbatim during the discovery questions.) Asks where the issue is. Walks with the customer to the location. The tech is not selling yet. The tech is confirming that they know why they are there and listening to anything new the customer wants to add.

TOUCHPOINT 6: THE DIAGNOSTIC WALK AND OPTIONS CONVERSATION

After the diagnosis, the tech presents options. Not one option. Three. Good, better, best. The customer chooses. The tech does not push. The framing that works: "I'll have him come by, he's one of my lead technicians, he'll take a look, tell you what's going on, if you like what he has to say I'll have the stuff on the truck." The tech is the diagnostic authority. The customer makes the call.

TOUCHPOINT 7: THE WARRANTY CONVERSATION

This is one of the touchpoints top operators name explicitly as a reason customers pay more. One HVAC company in Las Vegas sells a 5-ton unit for \$20,000 (compared to \$6,000 from competitors) because "they want to know that their warranty is going to be legit, that it's a safe person in their house."

The warranty conversation in the home covers three things explicitly:

- What is covered (parts, labor, both, how long)
- What the customer needs to do to keep the warranty active (annual maintenance, anything else)
- How the customer reaches you if something goes wrong (a number, an email, a portal)

Hand the customer the warranty card in writing. Walk them through it. The commitment principle from behavioral science applies here. Written, signed, publicly visible commitments outperform verbal agreements because the written record reminds the customer of what was promised.

TOUCHPOINT 8: THE IN-FIELD UPSELL BUTTON

The principle, deployed in field service mobile apps across the industry: the best time to pursue upsells is during an active service visit. A crew member clicks an "upsell button" in the field app and immediately sends the customer a text or email with a relevant add-on offer, capturing revenue at peak trust without an office call.

The trigger is the moment the tech notices something the customer has not asked about. A worn weatherstrip. An aging water heater. A second-floor vent that needs cleaning. The tech does not pitch it. The tech taps the button. The customer gets a text with a picture, a description, and a price. They say yes or no on their phone, in the moment, with the tech standing right there.

There is a specific timing rule for one type of upsell: service agreements should be sold by the CSR during the inbound call, not by the technician in the home. The reason: the minute the technician fixes the problem, there is no more emotional angst. Emotional urgency is the prime buying trigger. The CSR has it on the call. The technician loses it the moment the door is repaired.

So the split is: in-field upsells are for new work the tech surfaces during the visit. Service agreement memberships are sold on the original booking call, before the tech ever arrives.

TOUCHPOINT 9: THE 8-STEP SALES PROCESS CLOSE

The 8-step sales process used by top franchises documents this clearly. Step 8 is what most operators skip: "sell it right." After the sale, the tech spends an extra 5 to 20 minutes walking the customer through warranty, safety eyes, door programming, and a final offer to help. As one lead technician puts it: "That 20 minutes will save you hours on a callback where now you're not making money."

The post-sale walk-through is the moment the customer decides whether you were "the guys who fixed it" or "the guys who took care of us." That distinction is what produces the review, the referral, and the repeat call next year.

TOUCHPOINT 10: THE IN-PERSON REVIEW ASK

This is the technician layer of the review system. The principle: "People are more likely to leave a review for a person than for a company." A personal ask with a personal stake ("I want to be on the leaderboard for reviews this week") converts at a dramatically higher rate than an automated text alone. Train the ask. Role-play it weekly. Cover this in detail in the Review Generation SOP.

PHASE 3: AFTER THE JOB (CLOSE-OUT TO NEXT YEAR)

This is the phase that most operators underinvest in. Customer retention research backs it up: the first 100 days after acquisition determine whether the customer churns or stays. The same window applies to customers as to employees. The investment you make in the days after the sale is the investment that compounds the lifetime value.

TOUCHPOINT 11: SAME-DAY AUTOMATED POST-JOB TEXT

The standard at high-volume operators is non-negotiable. Every completed job triggers a post-job text within an hour of completion. One franchise services 67,000 customers in a single year. The review volume is automated, not manual. The text includes a thank-you, a one-tap review link, and a one-tap message-the-office option if something is wrong.

This text serves three purposes:

- It catches problems while they are still fixable, before they become one-star reviews
- It drives review volume, which drives map pack ranking
- It signals that the company is paying attention, which justifies the price premium

TOUCHPOINT 12: 24-HOUR FOLLOW-UP CALL

A 24-hour follow-up call (even by a junior CSR or intern) asks about the experience and then transitions to a testimonial or review request. Low cost, high return. Most operators do not do this. The ones who do compound trust into reviews and referrals.

This is also where the automation trap lives. Many companies sign up for missed-call text-back tools and follow-up automations and still fail to convert because nobody has time to make the human callback. A named owner of this seat (a CSR, an intern, an admin) closes the loop. Without that, the automation is decoration.

TOUCHPOINT 13: THE HANDWRITTEN THANK-YOU NOTE

One retention researcher tells a story about a handwritten thank-you note from a dry cleaner that he scanned and showed at three separate conferences. Two sentences. No coupon, no upsell. Cost: under \$5 and two minutes. The note called the customer "one of our favorite clients." The emotional impact is disproportionate because humans are "so desperate for a thank you" that a genuine handwritten note in an age of email is a trust asset that outperforms a \$200 gift.

One franchise automated this with a CNC machine that writes the cards. The customer cannot tell. The mechanism is what matters: the card arrives in the mail, on real card stock, with what looks like a real signature, after a real human interaction.

TOUCHPOINT 14: THE PHYSICAL THANK-YOU GIFT

For higher-ticket jobs, send a small physical gift approximately one week after job completion. The differentiation comes from the fact that almost no contractor does it. The gesture matters more than the contents. A \$15 box of cookies from a local bakery, a branded coffee mug, a \$10 hardware-store gift card with a note. Reciprocity research consistently shows: the gift works best when it is significant, meaningful, and personalized. A handwritten note tied to the specific service ("thank you for trusting us with your daughter's room remodel") outperforms a generic gift card every time.

TOUCHPOINT 15: THE 30/60/90-DAY FOLLOW-UP SEQUENCE

Programmed inside the CRM, fires automatically.

Day 30. Check-in text. "Hi [name], it's [your company]. The [door / unit / system] we worked on a month ago, how is it holding up? Reply YES if it is great, or NO if anything needs another look." This is low-friction. It catches anything that should have been a warranty visit and prevents the one-star review. It also signals to the customer that you remember them.

Day 60. Maintenance reminder or seasonal upsell. "Hi [name], your [system] is due for a quick tune-up to keep the warranty active. Reply BOOK and we will schedule it." Or seasonally specific: "Spring cleanup is opening up on our schedule. Want to lock in your preferred week?" One lawn care location generated \$30,000 in a single month with a texted "rainbow" add-on mow during a heavy rain period, framed as a lawn-health service rather than a forced frequency upgrade. Virtually zero cancellations.

Day 90. Referral ask or review nudge. "Hi [name], a quick favor. We grow mostly by word of mouth. If you know a neighbor who could use [service], here's a \$25-off card you can pass along, and they get \$25 off too." Or: "We just realized we never asked. Would you mind leaving us a Google review? Here is the link."

TOUCHPOINT 16: ANNUAL MAINTENANCE REMINDERS

Tied to the service date, not the calendar quarter. Automated handwritten cards (CNC machine) for yearly tune-up reminders, integrated with your field service software, are the gold standard. The card arrives roughly one year after the original service. It does not feel like an ad. It feels like a friend who remembered.

The service agreement principle: the third lever of revenue growth is keeping customers coming back. Service agreements produce a 15 to 20% premium on replacement jobs because the homeowner trusts a contractor they have paid to maintain the system over years. The annual reminder is the operational mechanism that produces that trust.

TOUCHPOINT 17: LAPSED-CUSTOMER REACTIVATION

For customers who have gone quiet at 12 months, 18 months, 24 months. This is consistently the highest-ROI lead source in the business. One mass text to an existing customer database generated 52 to 53 estimates, 18 accepted one-time jobs, and 3 recurring jobs accepted within 24 hours, at zero cost.

Send a seasonal-specific reactivation text. Not "we miss you." Something concrete. "We're booking fall gutter cleanings this week. Want your usual slot?" or "It's been about a year since we changed your filters. Want to schedule the next round?" Specific. Practical. Personalized to the original service. The 98 to 99% open rate of text dwarfs the 30 to 40% open rate of email. The estimate sent by email frequently lands in spam. The text does not.

TOUCHPOINT 18: NEW-MOVER OUTREACH (ADVANCED)

Top operators pull new home purchase data into their field service software and trigger "welcome to your new home" mailers to households that just moved into the service area. The mailer arrives during the window when the new owner is making contractor decisions for the first time. The hit rate is high because the timing is right. For most operators, this is a Stage 3 move. But the principle (timing outreach to the moment of need) is portable to every stage.

THE TECHNICIAN SCORECARD THAT RUNS THE JOURNEY

The principle: every role gets a number. The technician scorecard is what makes the journey predictable, because it ties compensation to the touchpoints customers feel.

Components:

- Close rate

- Average ticket
- Five-star reviews per pay period
- Callback rate (low is good, because callbacks indicate a missed step in the diagnostic or warranty conversation)
- Service agreement attach rate
- Referrals booked

Top operators explicitly list five-star reviews alongside conversion rate, average ticket, and warranty reduction as the KPIs that determine technician compensation. Reviews are not a wish list. They are a required deliverable of the job.

The pay structure makes the journey self-reinforcing. The tech who runs the 8-step process, completes the warranty walk-through, taps the upsell button, and asks for the review personally is the tech who earns more. The tech who skips those steps is the tech whose pay reflects that.

THE FIRST-100-DAYS CUSTOMER-RETENTION CURVE

Retention research shows: 20 to 22% of new hires quit within their first 45 days. 40% quit before their one-year anniversary. The same shape of curve applies to customers. The first 100 days after a job is the highest-risk window for a customer to disappear before you ever earn their second call.

The customer acquisition math forces the point. A customer acquired through paid advertising at \$300 CAC with \$1,600 annual value and 20% margin generates only \$320 net profit per year. It takes 11 months just to break even on the acquisition cost. If the customer churns before month 11, you lost money on that customer. Retention is not a soft metric. It is the financial leg of the business.

The 30/60/90 sequence above exists because of this curve. Every touchpoint is timed to keep the customer inside the window during the period they are most likely to leave.

WHERE THE JOURNEY BREAKS (AND HOW TO KNOW)

The structural model: the CSR-dispatcher-tech triangle is a triangle, not a chain. The CSR sets expectations. The dispatcher relays context and maximizes billable hours. The tech closes the call back through the dispatcher. A break at any vertex breaks the loop.

The most common break is the close-the-call step. The tech promises a return visit. Two weeks pass without follow-through. The customer is lost, and today, the failure becomes a public one-star review. A classic example: an A/C tech said "we'll be back next week" and never came. The customer told the story for years afterward.

The dispatcher owns the close-the-call confirmation. The CRM is the surface where it lives. Every promised callback gets a task with a date. Every task gets verified before it expires. No promise to the customer leaves the truck without a record in the system.

Adjacent data from the industry: cancellations can consume up to 15% of booked revenue. A company booking at 85 to 90% can still lose half those jobs to post-booking cancellations. The diagnostic: high cancellation rates are a CSR-experience problem, not a capacity problem. When a CSR creates a genuinely compelling experience on the first call, customers will wait. When the experience is transactional, customers cancel as soon as a delay arises.

The journey design is what prevents the cancellation. Pre-arrival texts, on-time updates, the tech photo, and the GPS link all signal to a customer in the waiting window that the company is paying attention. Silence in that window is what kills the booking. Touchpoint frequency is the antidote.

IMPLEMENTATION CHECKLIST

Before the job

- ☐ Automated booking confirmation by email and text fires immediately
- ☐ Pre-arrival tech photo, name, and bio sent before the appointment
- ☐ Live GPS tracking link sent when the tech is dispatched
- ☐ On-time arrival rate tracked per technician
- ☐ Pre-visit prompt question sent (commitment-style framing where the service supports it)

During the job

- ☐ Doorstep introduction protocol standardized (name, confirm, restate problem, walk together)
- ☐ Three options presented (good, better, best) on every diagnosis
- ☐ Warranty conversation covers what is covered, what the customer must do, and how to reach you
- ☐ Warranty card handed over in writing, walked through together
- ☐ In-field upsell button live in the field app, tied to text/email triggers
- ☐ Service agreement upsell sold by CSR on intake, not by tech in home (rule)
- ☐ 8-step sales process documented, including step 8 post-sale walk-through
- ☐ In-person review ask trained per tech (covered in Review Generation SOP)

After the job (same day to day 7)

- ☐ Automated post-job text fires within one hour of job completion
- ☐ 24-hour follow-up call assigned to a named owner (CSR, intern, admin)
- ☐ Handwritten thank-you note in the mail within 3 to 5 days

- ☐ Physical gift sent at ~7 days for higher-ticket jobs

After the job (day 30 to day 365)

- ☐ Day 30 check-in text fires automatically
- ☐ Day 60 maintenance reminder or seasonal upsell fires automatically
- ☐ Day 90 referral ask or review nudge fires automatically
- ☐ Annual maintenance reminder fires at the service anniversary
- ☐ Lapsed-customer reactivation sequence fires at 12, 18, and 24 months
- ☐ New-mover outreach configured if at Stage 3

Operational backbone

- ☐ Technician scorecard ties pay to close rate, reviews, callbacks, attach rate, referrals
- ☐ Dispatcher owns close-the-call confirmation; every promised callback is a CRM task
- ☐ Cancellation rate tracked per CSR (the spread is often 3% to 17%)
- ☐ CSR-dispatcher-tech triangle documented in the dispatch LMS
- ☐ On-time arrival rate visible on the operations dashboard

WHAT THIS SYSTEM PRODUCES

The journey is the answer to "why are they paying you more than the competitor?" Customers do not pay more because the company is cheaper. They pay because the phone gets answered well, the tech photo arrives before the doorbell, the warranty is explained, and the follow-up text catches problems early. Each touchpoint is small. Stacked together, they justify the premium.

One franchise ran 67,000 customers through this journey in a single year. One lawn care location runs an \$844,767 GM-managed operation where the owner has never met the technicians, because the system runs the journey without him. The journey design is what makes the absentee-ownable business possible.

Pick one phase to start. For most operators, the highest-ROI fix is the pre-arrival sequence (touchpoints 1 through 4) because customers feel it before they have a chance to decide what they think of you. For operators a step further along, build the day-30/60/90 follow-up sequence in the CRM. It is the touchpoint set that produces the second sale, and the second sale is what makes the first one profitable.

The Lead Response Playbook handles the first five minutes. The CRM Guide builds the architecture. This SOP designs every touchpoint in between and beyond. Together they are the capture system that makes a home service business a business, not a job.

All tactics in this SOP are sourced from operators who use them. Every script, sequence, and touchpoint comes from field research across 200+ home service operators running these systems at scale.

• WHAT'S NEXT •

READY TO *INSTALL* THIS?

BurksUP builds the marketing systems that make home service operators findable, bookable, and referable. This guide is the playbook. We're the team that installs it.

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