Service
by WORKWAVE

Optimize Your Sales and Onboarding Process

Target the right customers and gain their trust

There are several practical ways to improve your sales and onboarding process. The benefits will not only help you close more deals, but your sales team will feel supported and motivated to grow and improve.

Here are six strategies

1

Streamline Your Sales Process

Identify the steps in your sales process that are unnecessary or time-consuming and eliminate or automate them where possible. You'll close deals faster and more efficiently.

2

Use a Customer Relationship Management (CRM) System

A CRM system helps you manage customer interactions, track sales leads and automate certain tasks such as sending emails and generating reports.

3

Differentiate Your Business

By studying your competition, you can identify ways to differentiate your business from theirs. This will ensure you stand out in your local market and attract customers who are looking for something unique or currently not offered by anyone.

4

Implement a Sales Playbook

This is a set of guidelines and best practices for your sales team to follow when engaging with prospects and customers. This can help ensure that your team is consistently following a proven sales process.

5

Train Your Team on the Process

Make sure they are familiar with the steps in the sales processes and know how to follow them correctly. Make sure to offer ongoing training and support to help them succeed.

6

Smooth Onboarding

This helps you retain customers and reduce churn. Make sure you are transparent with new customers about how onboarding works, and provide them with all the information they need to get started.

LET'S GET TO WORK

Here are a few of the checklists that we recommend incorporating into your home services business:

CONSUMER JOURNEY
Sales to Customer Service

☐ **Scripts -** Have you created a standard script for your sales and customer service agents? Objections, service information and contract details should all be available.

☐ **Levers -** Have you documented the levers that your reps can use to close a sale? You'll need to document those in a presentable fashion.

☐ **Internal Notifications -** How do you notify technicians where there are changes to a customer account? I.e., when the customer has requested an additional location or service to be conducted. Is this within the software application or emailed?

☐ **Welcome Email -** Create an automated welcome email when someone signs up. Include job information, schedule, contact information, and cost/pricing.

☐ **Routine Check-Ins -** Create valuable content based on the consumer journey. This includes free content to boost your service, upsell opportunities, and regular check-ins.

☐ **Reviews Request -** Whether you ask at point-of-service, quarterly, or at the end of the year, create a schedule and template for asking for reviews.

☐ **Pricing -** Have you built a price book that makes selecting and bundling services easy? Are they displayed and updated regularly?

☐ **Follow-Up Cadence -** Do you have a CRM or another automated way to track open estimates? How often are you calling them back? The first vendor to respond and offer value will win 74% of the opportunities.

WORK ORDER PROCESSING
Entering and Processing a Work Order

- ☐ **Critical Information -** Do you have a list of the critical items needed to properly service the account? That might include contact information, square footage, services provided, and location. There's nothing worse than showing up without the equipment and materials to service the account.

- ☐ **Added to Route -** What are your best practices for adding accounts to a route? Have you established the boundaries so that you can account for drive time and technician availability?

- ☐ **Time and Materials -** Have you accurately projected the cost of servicing an account? Each job could require different materials and constraints.

- ☐ **Consistent Delivery -** Are your technicians saying the same thing as your customer service reps? When customers receive different information, it can cause some confusion in the service delivery.

FINANCIAL AND ACCOUNTING
Do you have your finances in order?

- ☐ **Payments -** Have you solidified and kept to a standard payment schedule? Teams can offer subscription, one-time or quarterly schedules. All of that can be confusing if you don't standardize and automate your collections. It can cost you up to $54,000 per year to do it manually.

- ☐ **Auto-Pay -** What percentage of your customers are on auto-pay? Do you encourage or require it when customers sign up? It's the best way to increase the value of your business and stop you from chasing down revenue each month.

- ☐ **Cash Position -** Are you regularly reviewing your cash position and reconciling each week? Securing account receivables every month will be the lifeblood of your business.

- ☐ **Invoicing -** Are you invoicing upfront or before your regular service appointments? Are you collecting fees at time of service? Either way, don't rely on a handshake to do the job.

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