CustomerFlows CRM

The Home Service Business Growth Playbook

The complete Attract → Capture → Qualify → Close framework + 90-day action plan

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This playbook is the complete framework for building a system that turns marketing dollars into predictable revenue. It is designed for home service businesses with 2–15 employees who want to grow revenue without growing headcount at the same rate.

The core idea: most contractors don't have a lead problem. They have a lead capture problem, a lead qualification problem, and a lead attribution problem. Fixing these three things typically doubles revenue from the same ad spend.

What's inside:

- The 4-stage revenue machine framework (Attract → Capture → Qualify → Close)
- Channel-by-channel marketing guide
- Key metrics dashboard with targets
- Tool stack recommendations per stage
- 90-day action plan

Stage 1: Attract

Get the right people to find your business

The Attract stage generates visibility among homeowners who need your services. Four primary channels, each with different cost structures and timelines.

Channel	Cost Model	Timeline	Best For
Google Ads	Pay per click ($5–50/click)	Immediate	Emergency services, high-intent searches
Google Local Service Ads	Pay per lead ($15–75/lead)	1–2 weeks setup	Broad local visibility, trust badge
Meta Ads	Pay per impression or click	Immediate	Awareness, seasonal promos, retargeting
Organic SEO	Time investment (free traffic)	3–6 months	Long-term authority, compounding returns
Referrals	Free (or referral fee)	Ongoing	Highest conversion rate, lowest cost

Action items:

- Set up Google Ads with 3–5 high-intent keywords for your trade
- Apply for Google Local Service Ads (Google Guaranteed badge)
- Create a Facebook Business Page with service area and contact info
- Claim and optimize your Google Business Profile
- Ask your last 5 satisfied customers for a Google review

Stage 2: Capture

Turn visitors into leads in your system

This is where most contractors lose money. The ads work. The visitors come. But 40–60% of inquiries never become a lead because the capture mechanism fails.

$0

cost of inbound WhatsApp conversations from Meta (free, no cap)

Capture Method	Response Speed	After-Hours?	Data Captured
Phone (manual)	Depends on staff	Voicemail only	What the person remembers
Website form	Whenever email is checked	Sits until morning	Name, phone, message
WhatsApp (manual)	When you see it	Delayed	Name, message, photos
WhatsApp + AI	Under 60 seconds	Yes — 24/7	Name, job type, urgency, address, budget, source

Action items:

■ Add WhatsApp button and QR code to your website

■ Set up AI chatbot for instant first response and qualification

■ Set up after-hours auto-reply on all channels

■ Install website visitor tracking for source attribution

■ Make sure every capture channel feeds into one central system

Stage 3: Qualify

Separate serious buyers from tire-kickers automatically

Not every lead is worth your estimator's time. Stage 3 ensures your team spends time on the leads most likely to close at the highest value.

21x

more likely to qualify a lead when you respond within 5 minutes

Question	What It Tells You	How to Use It
What service do you need?	Job type → revenue range	Route to correct pipeline
How urgent is this?	Willingness to pay premium pricing	Prioritize dispatch for emergencies
Property address?	Service area fit	Filter out-of-area leads
Own or rent?	Decision-maker status	Owners close faster
Budget in mind?	Price sensitivity	Qualify out leads below your minimum job value

Action items:

- Define your 5 qualifying questions for your trade
- Set up AI chatbot qualification (or train your team on a phone script)
- Create an urgency triage system (Emergency / Soon / Flexible)
- Define your minimum job value threshold

Stage 4: Close

Track every deal from quote to signed contract

Stage	What Happens Here	Key Action
New Inquiry	Lead captured and qualified	Review, assign to estimator
Estimate Scheduled	Site visit booked	Confirm via WhatsApp
Quote Sent	Estimate delivered	Follow up in 3–5 days
Approved	Customer accepted	Schedule the work
Job Scheduled	Work date confirmed	Pre-job prep and materials
Completed	Work finished	Send invoice + review request
Paid	Payment received	Trigger maintenance outreach
Lost	Did not close	Log reason for analysis

Action items:

- Set up a CRM pipeline with trade-specific stages
- Add required "Lost Reason" codes
- Set up stale-deal alerts (deals stuck 5+ days)
- Automate post-completion review requests
- Schedule a 30-minute weekly pipeline review every Monday

Your Key Metrics Dashboard

Metric	What It Measures	Target	Fix If Low
Lead response time	Speed of first contact	Under 5 min	Stage 2: Add AI chatbot
Capture rate	% inquiries become leads	80%+	Stage 2: Add channels
Qualification rate	% leads that are qualified	60%+	Stage 3: Better questions
Quote-to-close rate	% quotes become jobs	25–40%	Stage 4: Follow-up cadence
Cost per lead	Ad spend per lead	Varies	Stage 1: Ad optimization
Cost per acquisition	Ad spend per customer	Under 15% of job value	Stages 1–4: Full funnel
Revenue per source	Closed revenue by channel	Varies	Stage 4: Attribution
Customer LTV	Total revenue per customer	3–5x first job value	Maintenance upsell

Recommended Tool Stack

Stage	Tool	Cost	What It Does
Attract	Google Ads	$500–5K/mo	Paid search for high-intent keywords
Attract	Google Business Profile	Free	Local visibility and reviews
Capture + Qualify	CustomerFlows	$49–349/mo	WhatsApp AI chatbot, lead capture, attribution
Close	CustomerFlows (pipeline)	Included	CRM pipeline with trade-specific stages
Operations	Jobber	$49–249/mo	Quoting, scheduling, invoicing
Accounting	QuickBooks Online	$30–200/mo	Invoicing, expenses, taxes

Total cost for a small contractor: $128–298/month for the full stack (CustomerFlows + Jobber + QuickBooks), not counting ad spend.

Your 90-Day Action Plan

Days 1–7: Foundation

- Sign up for CustomerFlows (free 14-day trial)
- Select your trade and customize pipeline stages
- Connect WhatsApp and test the AI chatbot
- Install website tracking (one line of JavaScript)
- Claim and optimize your Google Business Profile

Days 8–30: Capture + Qualify

- Add WhatsApp button and QR code to website
- Add WhatsApp QR to business cards, trucks, yard signs
- Customize AI chatbot qualifying questions
- Set up after-hours auto-response on all channels
- Start Google Ads with 3–5 high-intent keywords
- Ask your last 10 satisfied customers for Google reviews
- Invite your team and train on pipeline updates

Days 31–60: Optimize + Measure

- Review first month of attribution data
- Pause or reduce budget on underperforming campaigns
- Double budget on your highest-ROAS campaign
- Review lost deal reasons — look for patterns
- Set up automated post-job review requests
- Set up stale-deal alerts (5+ days)

Days 61–90: Scale + Compound

- Apply for Google Local Service Ads
- Launch Meta retargeting ads for website visitors
- Set up automated maintenance outreach (30 days post-completion)
- Implement referral program (give a month, get a month)
- Full metrics review: compare Month 1 vs Month 3
- Plan next quarter's ad strategy based on 90 days of attribution

Ready to build your revenue machine?

Day 1 of your 90-day plan begins the moment you sign up.

Start your free 14-day trial

See pricing | customerflows.com