# The home services speed to lead playbook.

A guide to winning more jobs.
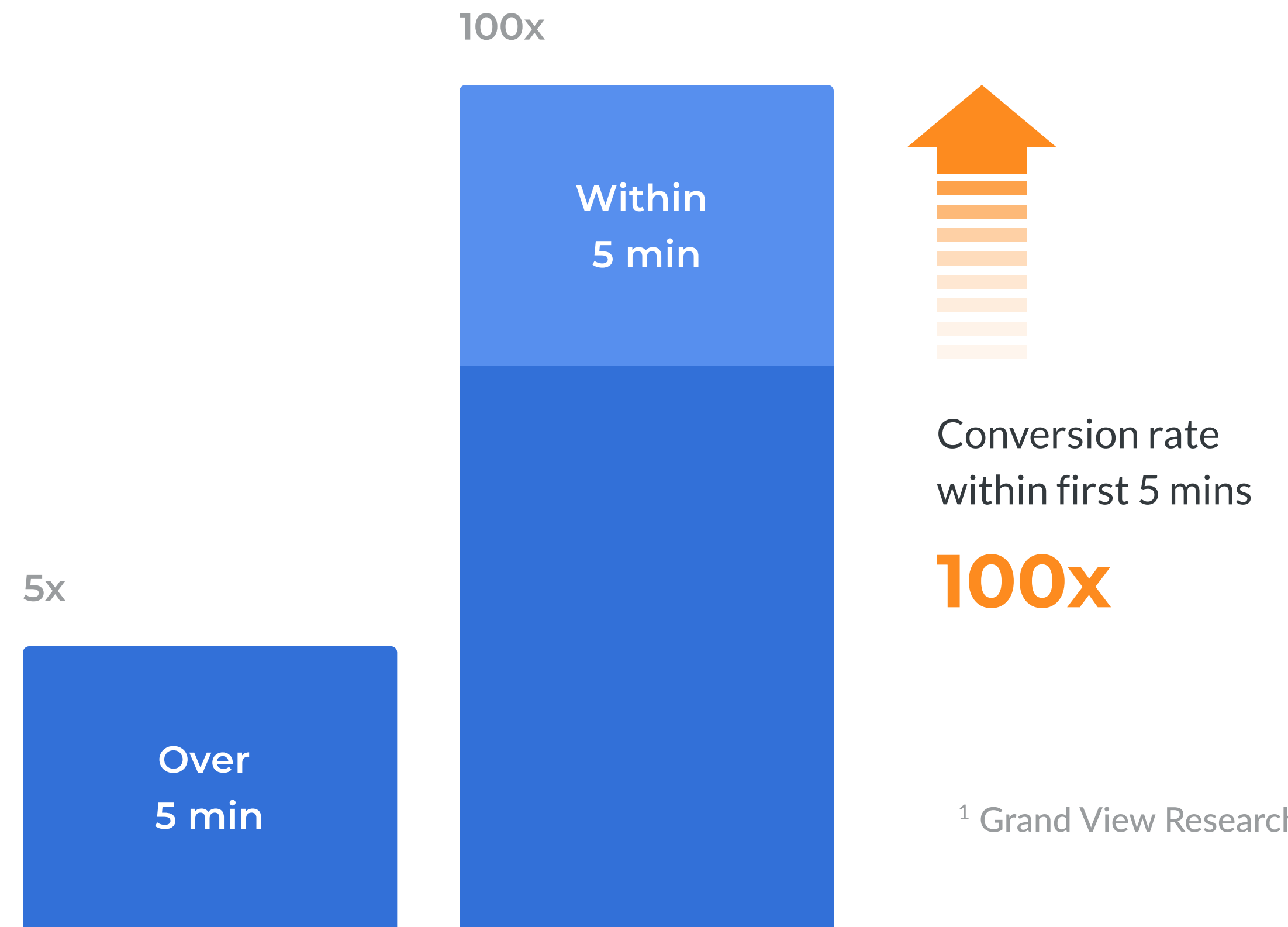
**AnswerForce**

2024

# Contents.

# What is speed to lead and why does it matter?

Speed to lead is the time it takes to get in touch with prospective clients. Having a quick speed to lead time can be the difference between new business or a missed opportunity.

Leads can come from a range of sources like inbound calls, website inquiries, social media or third-parties like Angi and Thumbtack. Wherever you get your leads, you need a fast follow up process to turn them into paying jobs.



100x

Within
5 min

Conversion rate
within first 5 mins

**100x**

5x

Over
5 min

[1] Grand View Research

The technology you need.

# Your website.

Your website should be set up to generate leads. By providing visitors with a clear call to action (CTA) and a logical path you want them to take.

- **Make what you do, your service area, and why it matters clear.**

- **Provide information on all your services, making it easy for people to select the ones that apply to them.**

- **Include specific CTAs that take them to the desired next step.**

Remember that phone numbers and emails should be clickable and take people to a live call or email form, and inquiry forms should be simple and only ask for core details. Complex forms put people off, and you can always get extra details when you follow up.
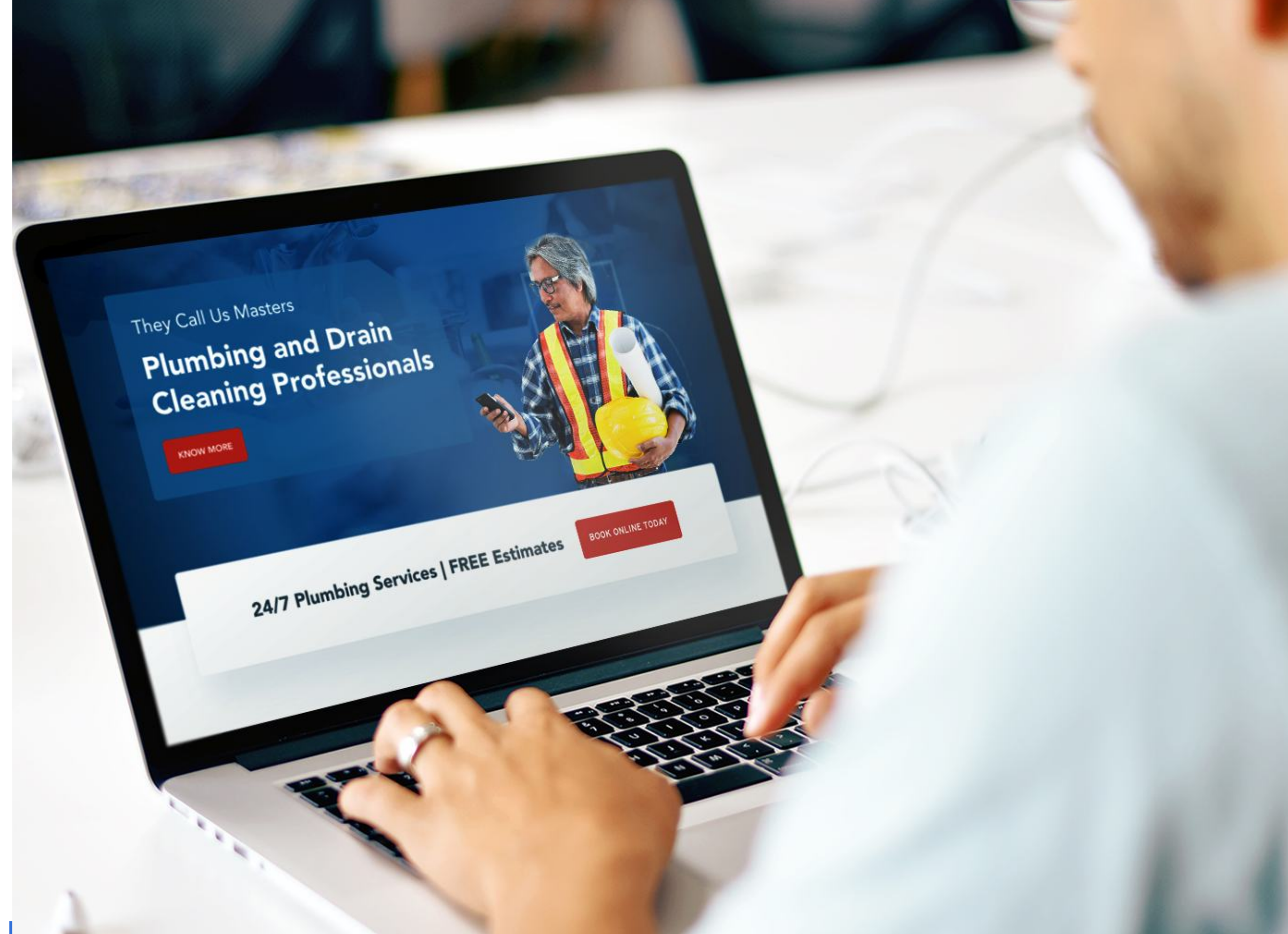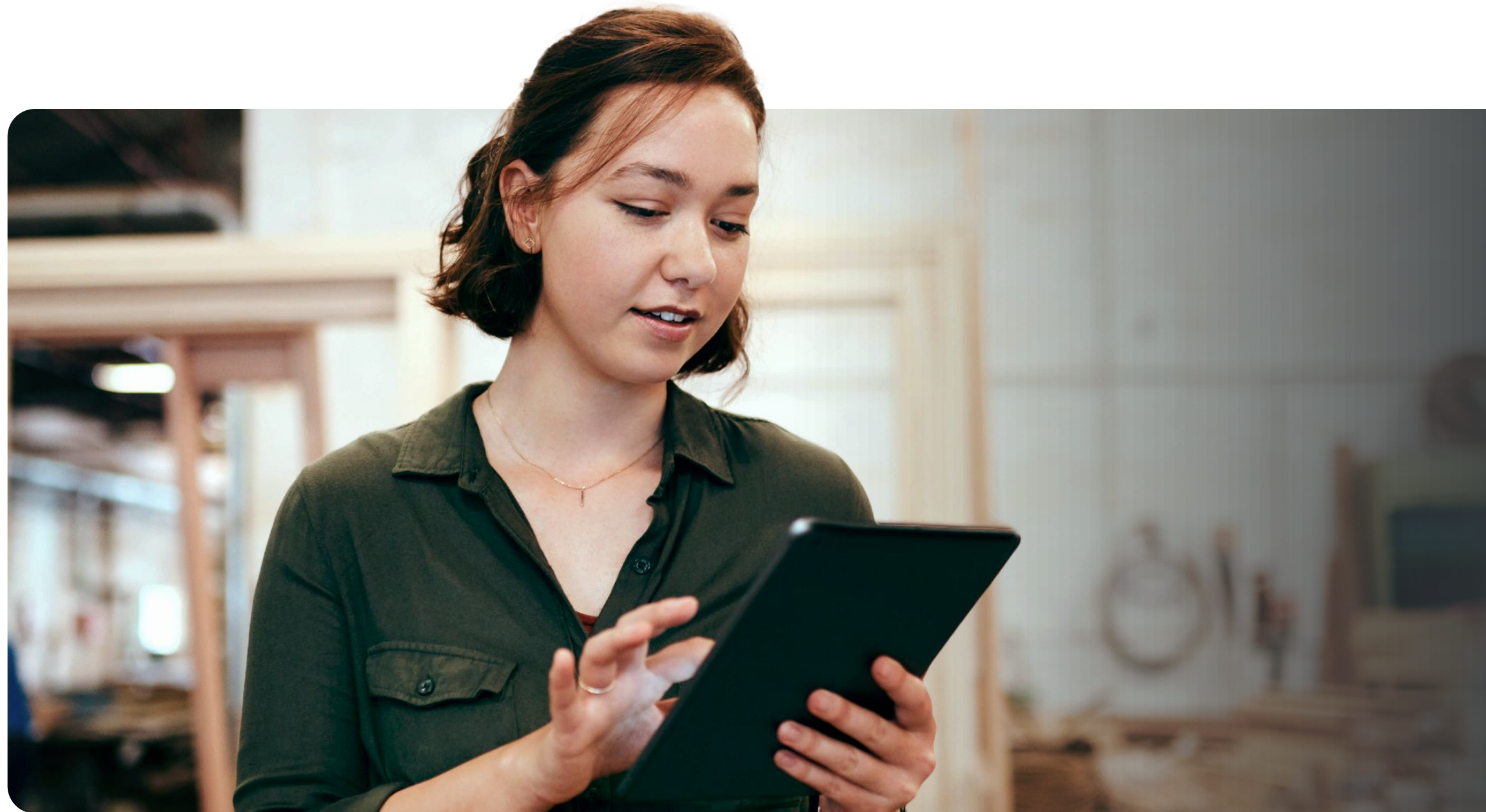


**PRO TIP**

Your site needs to **work just as well on mobile as it does on desktop.** Mobile searches for home services are increasing year on year, so this is a huge market you can't afford to ignore.

# Your CRM or job management software.

Your CRM or job management software should keep **all the key information in one place**. This makes it easy for you to use, and easy for you to guide your customers through the sales journey.

It should be flexible enough to be updated as you go through the workflow, ultimately becoming a **single source of information** on any client and their status in the pipeline.

Whoever looks at your job management software should be able to discover everything they need to know about **any client at any time.**

# Pre-built user journeys.

There are some services you may sell or quote for more often than others. In these cases, it's helpful to have pre-built user journeys so **you don't have to write the same texts and emails from scratch every time.**

Instead, you can just fill in the relevant details specific to that lead, saving you time and making your lead follow-up even faster.

Have these journeys **pre-built into your system**, and if possible automate them so people don't have to manually move leads throughout the workflow after action is taken.

You'll soon notice how much more efficient your day becomes.
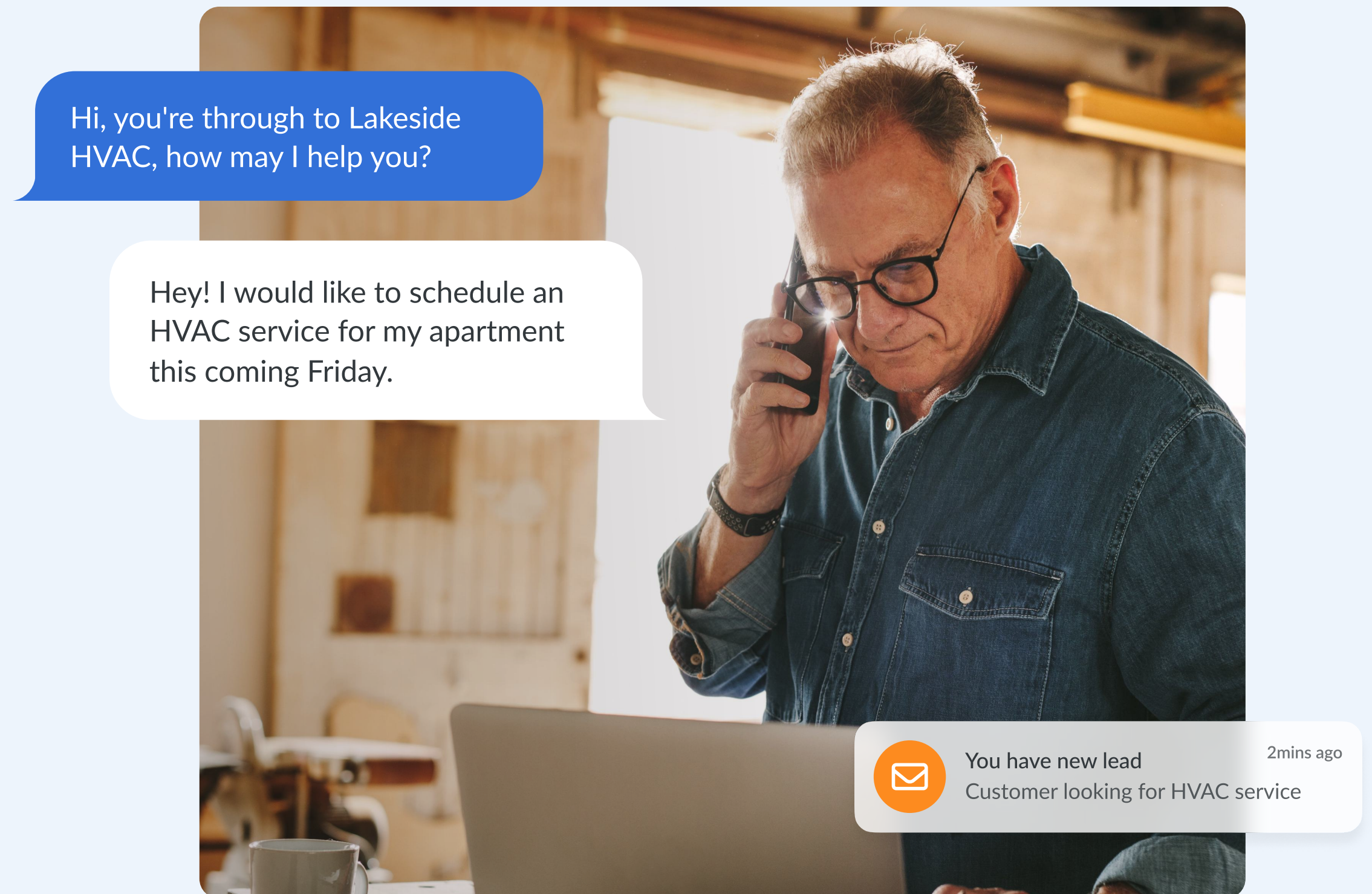
# How to increase your speed to lead.

# Decide who should be involved.

Now we know how important speed to lead is, let's look at how you can respond faster.

The first step is knowing who in your team needs to be involved and their responsibilities.

1. **Who is the lead owner and ultimately responsible for speed to lead?**

2. **Who will be doing the initial lead qualification work?**

3. **Who is best to provide accurate quotes?**

4. **Who will be closing the deal?**

5. **Who picks up the work out of hours and during weekends, and who provides cover when people are on holiday?**

With everyone in the loop, you can complete lead capture with confidence

# Understand your customers' needs.

Every lead is unique and can come to you in different ways and at various stages of their buying journey. Understanding where they are and what they already know is key to a successful conversion.

- **Your lead might need service right now, and may have called directly.**

- **They could be shopping around, in which case they may have used your website inquiry form.**

- **Or they have come through a third party and the lead has gone to multiple home service businesses.**

# What information to collect?

Getting the right information from a lead is vital to a successful conversion. After all, no one will respond well to being called the wrong name or asked questions they've already answered.

**Customers' expectations of that first contact are increasing.** If they've already provided you with information when they first got in touch, they'll find it very annoying to have to repeat it again. If you know what service the lead is looking for, and contact them prepared with all the correct information, you're more likely to turn them into a paying customer.

Be prepared to schedule the next step of their journey on the call, and see how much more business you win.

# Measure your progress.

To know whether you're improving, you need to measure each stage of the process. As these numbers change over time you'll be able to track progress.

These metrics can include your response time, the number of leads that answer, and your rate of lead conversion. Metrics can change throughout the different stages of lead qualification and vary depending on the size of the job.

### During the initial stages:

Measure your response time and the level of accuracy in your follow-up call. Are you responding in under 10 minutes?

### When estimating or scheduling smaller jobs:

Count the number of estimates scheduled vs the number of jobs won. This is your conversion rate.

### For larger jobs:

Look at the number of jobs at each stage of the sales pipeline and how many you've closed.

# Lead follow up.

(with examples)

# An example campaign.

**DAY 1**

## Outbound call within 10 mins.

**IF Answered:** Qualify lead, get project details, find out timeline, get an estimate visit scheduled on calendar. Email and text confirmation. Send a 'What happens next' email.

**IF NOT Answered:** Text to say you called; call again 10 minutes later. Follow up email and text with next steps and any information needed / link to schedule estimate.

**DAY 2**

## Follow up.

Call at a different time of day to yesterday. Text and email with next steps, including a link to take action.

**DAY 3**

## Reconnect with a personal touch.

If they haven't answered, call, text and email with what the next steps are, include social proof, like a star rating.

**DAY 4**

## Rest day.

No action

**DAY 5**

## Last check-in.

Call and text if not answered.

**DAY 6**

## Break up.

Send a text to ask if they've found the service they are looking for. Remind them that you are here to help if they haven't.

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# Example templates.

Here are some example templates that you can use across text and email with your customers at different stages of their journey.

### INITIAL RESPONSE

Hi {name}, thanks for inquiring about {inquiry type}. I just called to get it scheduled in but couldn't reach you. I'll call again in a few minutes. If there's a time that would be best for you, let me know. Thanks, {your name}, {business name}.

### ESTIMATE VISIT CONFIRMATION

Hi {name}, your estimate is booked in for {time and date}. If anything changes and you're no longer able to make that time, please call and let us know. Thanks, {your name}, {business name}.

### FOLLOW UP

Hi {name}, when is the best time to call and arrange the {service} you inquired about yesterday? Thanks, {your name}, {business name}.

### 30 MINUTES TO ARRIVAL

Hi {name}, your technician {tech's name} will be with you in 30 minutes. If you need anything else, please give us a call on {phone number}. Thanks, {your name}, {business name}.

### POST SERVICE THANK YOU

Hi {name}, thanks for using {business name}. Should you need us for anything, call us on {phone number}. We look forward to working with you again soon and remember to review our service on {review platform name} {link}

### PRO TIP

Including social proof in your email—such as reviews or a case study can improve your chances of winning new customers.

# Be the contractor that answers.

AnswerForce is here to improve your speed to lead 24 hours a day. Our home service receptionists are here to manage your calls, capture leads, schedule jobs, and call out to leads so you can compete with the best in the business.

Talk to our team today to see how we're powering home service businesses across the country.

**SCHEDULE A DEMO**