

The Home Service Growth Field Guide

The foundations checklist, the five core functions, the sales process, 12 closes and the numbers to track every week.

By Jonathan Blake, co-founder of The Lead Venture

25,000+ doors knocked · 10,000+ face-to-face conversations · 1,000+ jobs closed

Read it online, with calculators and video: theleadventure.com/playbooks/fundamentals

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Home Service Sales and **Growth** **Fundamentals**

The playbooks for each trade are specific. These are the basics that work in every one of them.



Written by **Jonathan Blake**, co-founder of The Lead Venture
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TL;DR

Every home service business runs on five functions: capture attention, lead nurture, sales, fulfillment, and retention and ascension. Get the foundations set up first, then find the weakest function and fix it before you buy more leads.

✓ Set up your Google, Bing and Apple profiles, a website that gets calls, consistent NAP and citations.

✓ Get leads from at least two of the Core Four: warm outreach, cold outreach, content and ads.

✓ Answer in minutes, set appointments same day or next day, and send reminders and a mini VSL.

✓ Follow one sales process, get every decision-maker there and close on the first visit.

✓ Do great work, then upsell, cross-sell and ask for introductions.

Bottom line: a great product creates word of mouth, but sales and marketing do most of the work of growing. You need both, every day.

Start Here: The Foundations Checklist

Before any ad, offer or sales script, get the basics in place. These are the things every home service business should set up once and keep up to date. Most of them are free. Skip them, and every dollar you spend on marketing works harder than it should.

Get found on Google, Bing and Apple

- **Google Business Profile:** claim and verify it, then fill out every field. Pick the most specific primary category, add every service, set your hours and service areas, write a real description, and upload photos of your crew, trucks and jobs. Post an update every week and reply to every review.
- **Bing Places and Apple Business Connect:** Bing can import your Google profile in a few minutes, and Apple Business Connect controls how you show up in Apple Maps and Siri. Fewer competitors bother, so it's easy ground to win.
- **Search Console and Bing Webmaster Tools:** verify your website in both and submit your sitemap, so you can see what you rank for and catch problems early.

WHAT WE SEE IN THE FIELD

Businesses that show a real local address on their Google profile, like a shop, office or storefront customers can visit, tend to rank higher and faster in the map results than service-area businesses that hide their address. If you have a real location, show it. Never use a virtual office, a mailbox store or someone else's address. That breaks Google's guidelines and can get your profile suspended.

Build a website that gets calls, not just compliments

- A click-to-call button and your phone number at the top of every page, on mobile first.
- A separate page for each service and each main city you serve, so Google can match you to what people search.
- A clear offer, real photos, reviews, your license and insurance, and a short form.
- Fast loading on a phone, and LocalBusiness schema so search engines read your details correctly.

Make your NAP consistent and build citations

NAP is your business **name, address and phone number**. Search engines compare it across the web, so it should be exactly the same everywhere, down to "St." versus "Street." Then list your business on the directories that matter, called citations: Yelp, the BBB, Angi, Nextdoor, Facebook, Yellow Pages, your chamber of commerce and your trade associations. Fix old listings with an outdated phone number or address first.

Claim your social handles and post

Claim the same handle on Facebook, Instagram, YouTube, TikTok, LinkedIn and Nextdoor, even the ones you won't use yet, so no one else takes your name. Then post real updates about your business every week: jobs, crew, reviews and tips. An active profile tells homeowners you're open, busy and trustworthy.

Set up the systems behind it

- A local phone number with call tracking, so you know which marketing makes the phone ring, plus missed-call text-back.
- A CRM that holds every lead, every estimate and every customer, with automatic replies and reminders.
- A review request that goes out after every job.
- A professional email at your own domain, branded trucks, uniforms and yard signs.

Check off what you have already done:

- ☐ Google Business Profile claimed, verified and fully filled out
- ☐ Bing Places and Apple Business Connect claimed
- ☐ Website with click-to-call, a page for each service and city, and a clear offer
- ☐ Google Search Console and Bing Webmaster Tools set up, sitemap submitted
- ☐ Name, address and phone (NAP) exactly the same everywhere
- ☐ Listed on the main local citations and directories
- ☐ Same handle claimed on Facebook, Instagram, YouTube, TikTok, LinkedIn and Nextdoor
- ☐ Posting real job updates every week
- ☐ A system that asks every customer for a review
- ☐ Local phone number with call tracking and missed-call text-back
- ☐ A CRM that holds every lead with a next step
- ☐ License, insurance and warranty shown on the site and every estimate
- ☐ Branded trucks, uniforms and yard signs
- ☐ Professional email at your own domain

Start Here: The Five Core Functions of a Business

Every home service company, from a one-truck lawn crew to a 50-person roofing company, runs on the same five functions. When growth stalls, one of them is broken. Find the weakest one and fix it first, because a leak early in the chain starves everything after it.



1. **Capture attention:** get the right homeowners to notice you. Ads, Google, yard signs, door knocking, content and referrals. The sign it's broken: not enough leads, or the wrong ones. See the [Core Four](#), [ads](#) and the [12 Pack](#).
2. **Lead nurture:** turn interest into a booked appointment that shows up. Speed to lead, qualifying, reminders and follow-up. The sign it's broken: plenty of leads, but few appointments. See [speed to lead](#), [BANT](#) and [follow-up](#).
3. **Sales:** turn appointments into signed jobs at a healthy price. The sign it's broken: lots of estimates, low close rate or constant discounting. See the [sales process](#), [types of closes](#) and [objections](#).
4. **Fulfillment:** deliver what you sold, on time, on budget and better than expected. The sign it's broken: callbacks, bad reviews, crews that miss days and jobs that lose money. See [fulfillment](#).
5. **Retention and ascension:** keep customers buying and move them up to bigger, recurring services. Maintenance plans, seasonal work, upgrades and referrals. The sign it's broken: every month starts from zero. See [referrals](#) and [ascension](#).

Fulfillment, a great product, is probably the most important of the five, because it creates word of mouth and keeps customers. But sales and marketing do about 80% of the work of growing a company. You need both.

Most owners try to fix every problem with more leads. But if nurture or sales is the leak, more leads just means more money wasted. Fix the leak first, then turn up the volume.

PART 1

Capture Attention

Get the right homeowners to notice you and raise their hand.

Positioning: Pick Who You Serve

Before you decide where to advertise, decide who you're advertising to. The businesses that grow fastest are known for something specific. "We do everything for everyone" sounds safe, but it makes you forgettable and forces you to compete on price.

- **Your ideal customer:** the type of homeowner or business, the neighborhoods, the size of job and the problem you solve best. Look at your 20 most profitable jobs from last year. What do they have in common?
- **Who you don't serve:** saying no to jobs that are too small, too far or a bad fit protects your margin and your crew's time.
- **Why you:** one sentence that says why your ideal customer should pick you over everyone else. "The metal roofing specialists for lake homes in [County]" beats "quality roofing at fair prices."

Once you know who you serve, every other decision gets easier: which Core Four channel, what offer, what photos and what words to use.

The Core Four: Every Way to Get a Lead

In *\$100M Leads*, Alex Hormozi sorts every way to get customers into four buckets. They split two ways: are you reaching people who already know you (warm) or strangers (cold)? And are you reaching out one person at a time, or to many at once?

1. Warm outreach

One-to-one with people who know you: past customers, old estimates, friends, neighbors and your phone contacts. Usually the cheapest jobs you'll ever get.

2. Cold outreach

One-to-one with strangers: door knocking, cold calls, cold email and walking commercial properties. Slow to scale, but you control the volume.

3. Posting content

One-to-many with your audience: job videos, tips, reviews and your newsletter. Builds trust that pays off for years.

4. Paid ads

One-to-many with strangers: Google, Local Services Ads, Meta and mail. The fastest to scale once you know your numbers.

Outbound means you go to them (warm and cold outreach). Inbound means they come to you (content and ads). Most contractors live on one bucket and starve when it dries up. Run at least two, and add a third when they're working.

On top of the Core Four, Hormozi describes lead getters: other people who bring you customers. For a home service business, that's **referrals** from happy customers, **partnerships** with realtors, property managers, insurance agents and other trades, **affiliates** who earn a fee for every job they send, and your own **employees** who refer friends and neighbors.

Branding vs Direct Response

Direct response marketing asks for an action now and is measured by the response: calls, forms and booked jobs. **Brand** marketing builds recognition and trust over time: your name, logo, trucks, uniforms, colors and reputation. Big companies can afford to run brand campaigns and wait. A local contractor usually can't.

- **Lead with direct response.** Every ad, mailer and post should have an offer, a reason to act now and a way to track it. In Dan Kennedy's direct response approach, every dollar is tracked and judged by what it brings back.

- **Get branding as a byproduct.** Every direct response piece with a consistent look, name and message builds the brand anyway. That's free brand building you get paid for.
- **Spend on brand where it also sells.** Truck wraps, yard signs, uniforms and a clean website work every day you're on a job.
- **Brand is a promise kept.** Seth Godin's point: a brand is what people expect from you. Showing up on time and cleaning up does more for your brand than a new logo.

Stack the Offer

A plain discount gives people a reason to wait for the next sale. A stacked offer gives them a reason to act now. Alex Hormozi's core idea in *\$100M Offers* is to make an offer so good people would feel stupid saying no. He calls it a Grand Slam Offer. You don't get there by cutting price. You get there by adding value until the price looks small.

The four parts of every offer

- **The reason:** why this deal exists. "We're already in the neighborhood" feels earned, not desperate.
- **A bonus:** something free on top, like free stump grinding with a removal or free gutter cleaning with a roof.
- **A guarantee:** reverse the risk.
- **A deadline:** a real date or a real limit, like the first 20 customers.

How to build a stacked offer

1. **Name the dream outcome.** Not "gutter cleaning" but "no more overflowing gutters or basement water this spring."
2. **List every problem the customer has** before, during and after the job: scheduling, mess, trust, the HOA, financing, the neighbors, what happens if it breaks.
3. **Turn each problem into a solution.** Mess becomes "full cleanup and magnet sweep." Trust becomes "photo report of every job." Money becomes "0% for 12 months."

4. **Trim and stack.** Keep the solutions that are high value to the customer and low cost to you. Bundle them into the core offer, then add 2 or 3 as bonuses with a real dollar value next to each.
5. **Add scarcity, urgency, a guarantee and a name.** Hormozi suggests a name that says who it's for, what they get and how fast, like "Spring Lawn Rescue: Thick, Green Yard in 60 Days or the Next Visit Is Free."

EXAMPLE: A STACKED ROOFING OFFER

Core: full roof replacement with a manufacturer warranty

Bonus 1: free gutter cleaning and a gutter guard upgrade quote (\$250 value)

Bonus 2: free attic ventilation check (\$150 value)

Bonus 3: photo report and drone video of your finished roof (\$200 value)

Guarantee: if we leave a single nail in your yard, we'll pay you \$100

Scarcity and urgency: 4 install spots left this month for homes on your street

Four types of guarantees

- **Unconditional:** "Not happy? We make it right or refund you." The strongest, best for low-cost services.
- **Conditional:** "Follow the watering schedule, and if the lawn isn't thicker in 60 days, the next treatment is free." Protects you and gets better results.
- **Anti-guarantee:** "All sales final because we order custom materials for your home." Works when you explain why.
- **Implied or performance:** you're paid on results, like "if we're late, the service call is free."

The types of front-end offers

The offer that gets someone to raise their hand isn't always the offer that makes you money. These are the common types, from lowest barrier to highest:

Free offers

Something of real value for nothing: a free roof inspection, a free tree health check, a free water heater flush or a free estimate with a photo report. Best for big-ticket trades where the money is in the follow-on job. Qualify first so you're not driving to tire kickers.

Deep discount offers

A first service far below normal price, like a \$49 first lawn treatment or a \$79 AC tune-up. You break even or lose a little on the first visit and make it back on the plan, the repair or the season. Only use it when you know your follow-on numbers.

Giveaway offers

Enter to win something big: a free roof, a free patio or a year of lawn care. Everyone who enters is a lead, and the runners-up often get a consolation offer like \$1,000 off. Great for building a list fast. Check your state's sweepstakes rules, and never require a purchase to enter.

Face value offers

The service at its real price, stated plainly: "Full exterior repaint, \$4,800, start next week." No discount, so you protect your margin. It works best with proof, a guarantee and bonuses stacked on top, and it attracts buyers who are ready now.

A healthy business uses more than one. Free and discount offers fill the top of the pipeline. Giveaways build the list. Face value offers, stacked with bonuses, are where the profit is. Then follow up and ascend every customer to the next service.

Before you run any offer, do the math: what does it cost to deliver, how many will buy the next step, and what's that customer worth over time? The **know your numbers** section shows how.

Lead Magnets: Give Value Before You Ask

Most homeowners aren't ready to book an estimate the first time they find you. A lead magnet is something useful they get in exchange for their contact info, so you can follow up when they are ready. In *\$100M Leads*, Alex Hormozi describes three kinds: one that reveals a problem they didn't know they had, one that gives a free sample or trial, and one that hands over one step of a bigger process.

- **Reveal a problem:** a free roof or tree inspection with a photo report, a water test, a home energy check or a "how old is your system?" quiz.
- **Free sample:** a first lawn treatment, a free gutter cleaning with an estimate or one room of carpet cleaned.
- **One step of the process:** a cost calculator, a "repair or replace?" checklist, a design idea board or a seasonal maintenance guide.

What makes a lead magnet work:

1. It solves one narrow problem for one type of customer.
2. It's delivered instantly, by text or email, not "someone will reach out."
3. It's genuinely useful even if they never hire you.
4. It points to the next step: book the estimate, with a reason to do it now.

Our 12 Pack calculator, revenue leak calculator and the 25+ roof calculators on Midwest Roofing Calculators are all lead magnets. So is the printed workbook a roofer hands out at the door.

Ads: Create Demand, Capture Demand

Ads work in every trade, but the platforms do different jobs. Meta creates demand by putting your offer in front of people who weren't looking yet. Google captures demand through Local Services Ads, pay-per-click and the map pack. Jonathan has run all of them, plus native ads. His rule of thumb is about \$1,000 a month in ad spend as a minimum to start, judged on cost per booked job, not cost per click.

Work the Neighborhood: The 12 Pack

Every job is a billboard for the homes around it. The 12 Pack turns one job into a neighborhood campaign: seven touches over 90 days, each with the same offer and deadline.

- Before: text past customers in the zip code, then knock the 12+ homes around the job.
- During: yard sign, a chalkboard offer sign, branded trucks and a second knock.
- After: a third knock, a before-and-after door hanger and a 3-text sequence for every "maybe."
- Then: a mailer the next week, EDDM at 30 and 90 days, and retargeting ads.

With his tree service and with roofing clients, one job typically turned into 3 to 5 closed deals. Run your numbers in the 12 Pack calculator and download the full playbook.

Redistribute Your Content and Be Everywhere

You don't need more content. You need to get more out of each piece. One job can feed a week of marketing on every platform, so homeowners in your area see you everywhere they look. That feeling of "I see these guys all over" is what makes you the obvious choice.

ONE JOB, TEN PIECES OF MARKETING

A 60-second video of the job, posted to Facebook, Instagram Reels, YouTube Shorts and TikTok.

The before-and-after photos as a Google Business Profile post and a Nextdoor update.

A short blog post or project page on your website, which helps your local SEO.

A section in this month's email newsletter.

The customer's review, turned into a graphic.

The same video as a retargeting ad to people who visited your site or live near the job.

Film once, edit once and post everywhere. Use the same name, look and message on every platform. Being omnipresent isn't about posting more. It's about showing up consistently wherever your customers already are.

Reviews: Word of Mouth at Scale

Before most homeowners call, they read your reviews. Count, recency and your replies all matter.

- Ask every customer at the moment they're happiest, usually the final walkthrough, and text the link right then.
- Make it one tap. A direct link to the review box, not your homepage.
- Reply to every review, good or bad, within a day or two. Thank people by name and handle complaints calmly.
- Never pay for reviews or offer rewards for good ones. It breaks Google's rules and FTC rules.

Promote Every Day

The most common mistake Jonathan sees: many operators are production people at heart. They're great at the work, but they don't promote the business enough, and they don't sharpen their sales process every day. Promotion isn't something you do when it gets slow. It's something you do every day, so it never gets slow.

Plan the Year: A Marketing Calendar

Most trades are seasonal, and the companies that win start marketing before the season, not during it. Map out the year once, then follow it.

- **4 to 8 weeks before your busy season:** past-customer texts, early-bird offers, ads and mail, so the schedule fills before competitors wake up.
- **During the busy season:** the 12 Pack around every job, reviews and content from every job, and referral asks.
- **As the season ends:** renewals, maintenance plans and next-season agreements.

- **The slow season:** reactivate old estimates, sell maintenance and indoor or off-season services, train the team and fix your systems.

See our seasonal marketing ideas for home service businesses for a month-by-month plan.

"Promotion isn't something you do when it gets slow. It's something you do every day, so it never gets slow."

— Jonathan Blake

PART 2

Lead Nurture

Turn interest into an appointment that actually happens.

Speed to Lead

The first company to respond usually gets the job. Research cited in our speed-to-lead case study found that answering within 5 minutes makes a business far more likely to reach and qualify a lead than waiting 30 minutes. We took one business from 8+ hours to respond to under 30 seconds with instant replies and missed-call text-back.

- Answer live when you can. Let the system answer when you can't.
- Missed-call text-back on every business number.
- Same-day or next-day appointments. Interest fades fast.

Qualify With BANT

Setting the appointment is where many sales are won or lost. Before you drive out, find out four things:

- **Budget:** cash, financing or insurance? Are they thinking about a total or a monthly payment?
- **Authority:** who decides? Get every decision-maker at the appointment, plus anyone who'll have an opinion on the project or the investment: a spouse, a parent helping pay, an adult child or a business partner. Selling to one spouse ("a one-legger") is the most common reason a good appointment ends in "we need to talk it over."
- **Need:** what's actually wrong, and what happens if they don't fix it?
- **Timing and trust:** when do they want it done, and what would they need to see to feel comfortable with you?

Setting Appointments and Reminders

Interest fades fast. The longer the gap between the call and the appointment, the more people cancel, don't answer the door or book someone else. A homeowner who calls Monday and hears "we can come out a week from Thursday" will often call two more companies before then. Set estimates the same day, the next day or as close as you can.

- **Book it on the first call.** Never say "we'll call you to schedule." The appointment set while they're on the phone is the one that happens.
- **Offer two soon times:** "I can have someone there this afternoon at 4 or tomorrow at 10. Which works better?"
- **Hold time for new estimates every day,** so you're never booking a week out.
- **Get every decision-maker there,** plus anyone who'll have an opinion on the project or the investment. "Is there anyone else who'll want a say in this, like a spouse, a parent or a partner? Let's pick a time that works for everyone." That's what makes the one-call close possible.

- **Set expectations:** how long it takes, what you'll do and that you'll give a price and options at the visit.

AN APPOINTMENT REMINDER SEQUENCE

Right after booking: a confirmation text with the date, time, address and the mini VSL (below).

The day before: "Looking forward to seeing you tomorrow at 10. Reply C to confirm or R to reschedule."

The morning of: a short reminder, plus who's coming and what to have ready.

On the way: "[Name] is on the way and will be there in about 20 minutes," with a photo of the tech or rep.

If they don't confirm: a call. If they reschedule, rebook on the spot instead of "we'll reach out."

Automate all of it in your CRM so it happens on every appointment, not just when someone remembers. A reschedule caught the day before is a saved appointment. A no-show you find out about in their driveway is a wasted trip.

The Mini VSL: Pre-Sell Every Appointment

A short video sent right after someone books does three jobs: it gets them to show up, it sets expectations and it pre-sells you before you arrive. Marketers call a video built to sell a VSL, short for video sales letter. For a home service business, a mini VSL of 2 to 4 minutes shot on your phone works. Send it with the confirmation text and again with the day-before reminder.

WHAT TO COVER IN A MINI VSL

Who you are and why you started the company. Show your face.

Exactly what will happen at the appointment and how long it takes.

Who should be there: "Please make sure everyone who'll help decide can be there."

That you'll give a price and options at the visit, so they can decide that day.

Two or three short customer stories or reviews.

What makes you different: your guarantee, warranty or process.

The customer already knows you'll present a price, that every decision-maker should be there and why people choose you. That raises show rates and close rates at the same time. Film a few more short videos that answer your most common objections, like price, timing and "we're getting other quotes," and send the right one after an estimate that didn't close.

Follow Up 5 to 10 Times

If it doesn't close at the table, Jonathan follows up 5 to 10 times, by call, text and email, until he gets a clear yes or no. How many times depends on the job and the person. Bring something new on each touch: photos, a review, a financing option, a schedule opening. After that, move the lead to an email sequence and your newsletter. A clear no is fine. Silence is what costs you jobs.

Old estimates are worth money too. One reactivation campaign turned a list of 1,200 contacts into about \$18,000 in revenue.

"A clear no is fine. Silence is what costs you jobs."

— Jonathan Blake

Run Every Lead Through One System

Leads lost in a notebook, a text thread or someone's memory are the most expensive leak in most home service companies. Put every lead in one CRM with clear stages, like new, contacted, booked, estimate given, won and lost, and a next step with a date on every open lead. Then look at it weekly: where are leads stuck, and why? That one habit usually finds more money than any new marketing channel.

Use AI Where It Saves Time and Money

AI won't replace a good salesperson or a skilled crew, but it's already great at the repetitive work that loses jobs when nobody gets to it.

- **An AI receptionist or chat assistant** that answers calls and texts at any hour, answers common questions and books the appointment. That's speed to lead without hiring a night shift.
- **Instant follow-up** on every new lead and every estimate, written for that customer.
- **Review replies** drafted for you to approve.
- **Content** turned from one job video into captions, posts and an email.
- **Call summaries** so you know what was promised before you walk in.

Keep a human in the loop for pricing, promises and anything that sounds upset. And make it easy to reach a person. Customers don't mind an assistant. They mind being trapped by one.

PART 3

Sales

Turn appointments into signed jobs at a healthy price.

The Kitchen-Table Sales Process

Great salespeople don't wing it. They follow the same steps on every appointment, so the customer always feels guided and nothing important gets skipped. This is the in-home process Jonathan uses:

1. **Introduction and rapport:** a real greeting, a compliment on something genuine and a little common ground. People buy from people they like.

2. **Set the agenda:** "Here's how today works. I'll ask a few questions, take a look, show you what I find and give you options and a price. If it makes sense, we'll get you on the schedule. If not, no hard feelings. Fair?"
3. **Discovery:** ask about the problem, how long it's been going on, what they've tried, what happens if they wait and what a great result looks like to them. Then do the inspection.
4. **Our company:** a short story of who you are, how long you've been doing this and what you stand for. Keep it to two minutes.
5. **The solution:** walk through what you found, with photos, and the products or services that fix it.
6. **Why us:** how you're different from the other options: your warranty, guarantee, crew, cleanup and reviews. Compare fairly. Never trash a competitor.
7. **The investment:** present good, better and best options with the price and a monthly payment for each.
8. **Ask for the decision:** use a close from the list below, then stop talking.
9. **Handle concerns and ask again:** isolate the real concern, solve it together and close again. Most sales happen after the first "let me think about it."

Role-play this with your team every week. The best closers practice on each other, not on customers.

Alex Hormozi's CLOSER Framework

Hormozi teaches a six-step framework for sales conversations called CLOSER. It fits neatly inside the discovery and closing steps above:

- **C, Clarify** why they're here: "What made you reach out now?"
- **L, Label** them with the problem, in their words: "So it sounds like the leak is getting worse and you're worried about the ceiling."
- **O, Overview** past pain: what they've already tried and why it didn't work, like patches, a cheaper contractor or waiting.

- **S, Sell the vacation**, not the plane flight: the outcome they want, like a dry house, a yard they're proud of or never thinking about the AC again. Not the shingles or the equipment.
- **E, Explain away** concerns: money, timing, trust, the spouse and "other quotes." Use the six-step objection process below.
- **R, Reinforce** the decision after they say yes: congratulate them, explain exactly what happens next and when, and ask who else they know who needs the same.

The One-Call Close

Jonathan is a big believer in closing on the first visit. Every second appointment is another chance for a no-show. Qualify hard on the phone, get every decision-maker there the first time, present the price and ask for the business. When a decision-maker is missing, try to get them on a video call before you leave, or send a short video walkthrough and set a specific time to finish.

"Every second appointment is another chance for a no-show. Get everyone at the table and ask for the business the first time."

— Jonathan Blake

Types of Closes

A close is just a clear, comfortable way to ask for the decision. Have several ready and use the one that fits the person. Use them honestly: never invent a deadline or a discount that isn't real.

Option close

Give two yeses to choose from. "Does option A or option B work better for you?" or "Would Tuesday or Thursday be better to start?"

Assumptive close

Talk as if they've decided. "Let's get you on the schedule. What's the best number for the crew lead to text?"

Summary close

Recap everything they agreed with, then ask. "You want it done before winter, you liked the 50-year warranty and the payment fits. Shall we get started?"

Takeaway close

Remove something and let them choose. "If the best option is more than you want to spend, we could drop the gutter guards and do those next spring." People often want back what's taken away.

Urgency close

Point to a real reason to act now. "We have one install opening before the holidays, and the material price goes up on the 1st."

Question close (porcupine)

Answer a question with a question. "Can you do it in charcoal?" "If we can, would you want to move forward today?"

Sharp angle close

When they ask for something, tie it to a decision. "If I can get it finished before your daughter's graduation party, are we good to go?"

Ben Franklin close

For careful thinkers: list the reasons to do it and the reasons to wait, side by side, together. The right choice usually becomes obvious.

Trial close

Check the temperature before the big ask. "How does that sound so far?" or "On a scale of 1 to 10, where are you?" If it's not a 10, ask what would make it one.

Monthly payment close

Reframe the total. "It's \$14,800, or about \$245 a month with financing. Which is easier for you?"

Neighbor close

Use real social proof. "We're doing the Hendersons' roof next door next week. If we do yours the same week, we save on setup and pass it on to you."

Silent close

Ask for the decision, then stop talking. The first person to speak after the question usually loses the point.

Handle Objections in Six Steps

When a customer pushes back, don't argue and don't drop your price. Let them talk it through:

1. **Identify:** acknowledge what they said so they feel heard.
2. **Isolate and confirm:** "Other than that, is there anything else holding you back?"
3. **Re-identify** it with them, in their words.
4. **Clarify:** ask questions until you understand the real concern.
5. **Overcome** by solving it together, not by pitching harder.
6. **Ask** for the business.

Money is the top objection in every trade. Ask which part is the problem: the total, the deposit or the monthly payment. New information allows for a new decision, so give them something they didn't know and they can change their mind without losing face.

WHEN THEY SAY "I NEED TO THINK ABOUT IT"

"Totally understand, and that's my fault. I want to be your source of truth here."

"Typically when someone says they need to think about it, it's a polite way of saying no, and that's okay."

"Just for clarity, what was the main concern?"

Then go back to step two: isolate it, clarify it and solve it together.

Price to Margin, Offer Financing

Price from your real costs, not from the cheapest competitor:

$$\text{Price} = (\text{direct job costs} + \text{share of overhead}) \div (1 - \text{target gross margin})$$

On bigger jobs, show a monthly payment next to the total. Many customers who can't write a check for the whole project can handle a payment, and they often choose a better option when they see it that way. Use bonuses instead of discounts to protect your price.

PART 4

Fulfillment

Deliver work so good it markets itself.

Fulfillment: A Great Product Is the Foundation

Fulfillment, or having a great product, is probably the most important function of all. It's what creates word of mouth, keeps retention high and lets you keep growing without buying every customer from scratch. A company that does great work gets referrals, reviews and repeat jobs for free. A company that does average work has to pay for every customer, forever.

But a great product doesn't sell itself. Plenty of excellent tradespeople have empty calendars. Sales and marketing do about 80% of the work of growing a company: getting found, getting the call, booking the appointment and closing the job. Fulfillment is what makes all that effort pay off over and over.

- **Write down the standard:** what "done right" looks like for every job type, with a checklist and photos. That's how it stays great when you're not on the job.
- **Communicate before, during and after:** when you're coming, what's happening and what's next. Most complaints are about silence, not workmanship.
- **Leave it cleaner than you found it,** and do a final walkthrough with the customer before you leave.
- **Fix problems fast and without arguing.** A callback handled well often earns a better review than a perfect job.
- **Track callbacks, complaints and reviews** by crew, so you know where quality is slipping.

"A great product creates word of mouth and keeps customers. Sales and marketing do the work of growing. You need both."

— Jonathan Blake

Get fulfillment right and every other function gets easier: marketing has better reviews to show, sales has more referrals to close and retention takes care of itself.

PART 5

Retention and Ascension

Keep customers buying and move them up.

Referrals and Loyalty Rewards

Most contractors ask for referrals once, at the end, and get "I'll think about it." Jonathan plants it early: "80 to 90% of my clients come from word of mouth and introductions. If we knock it out of the park for you, would you be against introducing someone who might need this?" Then on the final walkthrough, he asks by name.

- Ask for introductions, not referrals. A free, low-barrier offer, like an inspection, is easy to pass along.
- Pay real cash. For example, \$250 cash to the customer plus \$250 off for their friend, or \$500 cash.
- Reward super affiliates. Customers who send five or more a year get a comped three-day Fort Lauderdale trip through a travel partner, booked in the slow season for about \$150. The same trip works as a sign-today bonus on projects over \$10,000.
- Run a yearly review and referral campaign. It typically brings back 10 to 20% of a past customer list as reviews and referrals.

"Ask for introductions, not referrals."

— Jonathan Blake

Upselling and Cross-Selling

Your best customer is the one you already have. They trust you, and it costs almost nothing to offer them more.

- **Upselling** is a better or bigger version of what they're already buying: a premium shingle, a higher-efficiency system, a longer warranty or a full-season plan instead of a single visit.
- **Cross-selling** is a related service they also need: gutters with a roof, stump grinding with a tree removal, a water softener with a water heater or snow removal with lawn

care.

Do it at the right moments: during the estimate with good, better and best options, at the final walkthrough when they're happiest, and in your newsletter and seasonal reminders. Train crews to spot and photograph extra work. And only offer what genuinely helps the customer. A recommendation they're glad they took builds trust, and one they regret costs you the referral.

Ascension: Move Customers Up

Ascension means moving a customer to a bigger or recurring service after the first job. The first sale is the hardest and most expensive. Every sale after that costs almost nothing.

- **One-time to recurring:** a repair customer joins a maintenance plan, or a one-off mow becomes a season agreement.
- **Small to big:** a gutter cleaning becomes a gutter guard install, or a tree trim becomes a removal.
- **One service to the next:** a roof customer gets siding, or a lawn customer gets a patio.

Plan your ladder on paper: what's the entry offer, what comes next and what does a customer look like after three years? Then make the next step part of every final walkthrough and every newsletter.

PART 6

Run the Business

Measure it, and learn from the best.

Know Your Numbers

Track them every week with our free weekly KPI scorecard. It does the math and shows which function is leaking.

You can't fix what you don't measure. Every owner should know these five numbers by heart, by lead source:

- **Cost per lead** and **cost per booked appointment**.
- **Close rate** from appointments run, not from leads received.
- **Average ticket**, the blended value of a closed job.
- **Customer acquisition cost**: total sales and marketing spend ÷ new customers.
- **Lifetime value**: average ticket × jobs per customer over the years, plus the referrals they send.

When lifetime value is at least three times acquisition cost, you can afford to outspend competitors for the same customer. That's how the biggest company in a town usually got that way.

QUICK MATH

You spend \$3,000 a month on marketing and close 6 jobs. Acquisition cost is \$500. If the average customer is worth \$12,500 over time, every \$1 of marketing that lands a customer returns about \$25 in revenue. Spend more on the source that produced it.

Cash Flow: Growth Eats Cash

Plenty of contractors go broke while they're busy. You pay for materials, payroll and marketing before the customer pays you, so the faster you grow, the more cash you need. Profit on paper doesn't pay the crew on Friday.

- **Take deposits** on every job that needs materials ordered, and check your state's rules on deposit limits.

- **Bill in stages** on bigger jobs, tied to milestones, so you're never funding the project yourself.
- **Collect on completion**, at the final walkthrough, not "we'll send an invoice." Take cards and offer financing so payment is easy.
- **Use financing partners** who pay you up front while the customer pays monthly.
- **Watch receivables weekly.** Money that's 30 days late is a phone call. Money that's 90 days late is often gone.
- **Keep a reserve** of about three months of overhead for slow seasons, storms and surprises.
- **Separate the money:** set aside taxes and your own pay before you spend on growth.

Build and Train the Team

You can't grow past yourself without people. Hire for attitude and train for skill, because you can teach someone to measure a roof but not to show up on time. Write down your scripts and checklists, role-play sales and phone calls every week, and pay salespeople on results so their goals match yours. Review each rep's numbers monthly: appointments run, close rate and average ticket.

Protect the Business: A Compliance Checklist

This isn't legal advice, and the rules change by state. It's the list of things to review with your attorney and insurance agent before you scale.

- **Licenses and insurance:** the right license for every service, general liability, workers' comp and commercial auto, with certificates ready to send.
- **Written contracts and estimates** with the scope, price, payment terms, change orders, warranty and cancellation terms. Many states give homeowners a right to cancel certain sales made at home within a few days.

- **Text and call consent:** get written consent before marketing texts or automated calls, honor STOP right away and keep records. Fines under the TCPA can add up fast.
- **Email rules:** include your address and an unsubscribe link in marketing emails.
- **Reviews and claims:** never buy or fake reviews, and back up any claim you make in ads.
- **Lien waivers and permits** on jobs that need them, and lead-safe practices on homes built before 1978.
- **Hiring:** classify workers correctly as employees or contractors.

What the Marketing Greats Teach, Applied to the Trades

None of the ideas below were written for roofers or plumbers, and that's the point. The best marketers of the last 70 years found principles that work in any business. Here's what each one teaches and how Jonathan applies it in a home service company. The ideas are paraphrased, and the books are listed at the bottom of the page.

Alex Hormozi: Make an Offer They'd Feel Stupid Refusing

In *\$100M Offers*, Hormozi argues that most businesses compete on price because their offer is a commodity. His fix is the value equation: value goes up with the **dream outcome** and the **perceived likelihood** it happens, and goes down with the **time delay** and the **effort and sacrifice** the customer has to put in.

- **Dream outcome:** sell the result, not the service. "A yard you're proud to host in" beats "weekly mowing."
- **Likelihood:** reviews, before-and-afters, a written warranty and a guarantee raise it.
- **Time delay:** "We can start Tuesday" is worth money. So is a same-day estimate.
- **Effort:** do the permits, haul the debris, handle the insurance paperwork and offer financing.

In *\$100M Leads* he names four ways to get customers: warm outreach to people who know you, posting free content, cold outreach and paid ads. Most contractors only do one. The 12

Pack uses all four in a single neighborhood.

Jay Abraham: Three Ways to Grow, and Preeminence

Jay Abraham teaches that there are only three ways to grow a business: **more customers**, a **higher average sale** and **more purchases per customer**. A 10% gain in each grows revenue by about 33%, because the gains multiply.

- **More customers:** referrals, the 12 Pack and a faster response.
- **A higher average sale:** good, better, best options and add-ons at the table.
- **More purchases:** maintenance plans, seasonal services and yearly check-ins.

He also teaches the **strategy of preeminence**: act as the customer's trusted advisor, not a vendor. Tell them what's best for them, even when it's a smaller job or a competitor's specialty. And use **risk reversal**: take the risk off the customer with a strong guarantee, because the side that carries the risk is the one that hesitates. Finally, he warns against a business that stands on one pillar. If one lead source carries everything, you're one algorithm change away from trouble.

Dan Kennedy: Message, Market, Media

Dan Kennedy built his No B.S. books on direct response: every dollar of marketing should produce a measurable response. His **message-market-media** triangle says the right message has to reach the right people through the right channel. A great roof offer sent to renters fails. So does a great offer on a platform your homeowners don't use.

His rules for every piece of marketing translate straight to a door hanger, postcard or ad:

- Always make an offer. Never run "brand awareness" with no reason to call.
- Give a reason to respond right now: a deadline or a limited number of spots.
- Tell them exactly what to do next: call, text or scan.
- Track every piece. Use a unique number, code or landing page so you know what worked.

- Follow up. Most of the money is in the follow-up, not the first touch.

Kennedy also says one is the most dangerous number in business: one lead source, one big customer, one salesperson. Build at least three of each.

Seth Godin: Be Remarkable, Earn Permission

In *Purple Cow*, Seth Godin argues that safe, ordinary products are invisible. Remarkable means worth making a remark about. For a contractor, that's rarely the work itself, because customers can't judge it. It's the experience: a crew that shows up on time, cleans better than they found it, sends a photo report and texts when they're 15 minutes out.

In *Permission Marketing*, he says the best marketing is anticipated, personal and relevant. A homeowner who joined your newsletter, asked for seasonal reminders or got a useful tip from you is far easier to sell than a stranger. That's why every lead that doesn't close should go on an email sequence and the newsletter.

In *This Is Marketing*, he says to pick the smallest market you can serve and own it. A roofer who is "the metal roof company in the county" beats one who does "all roofing everywhere."

Robert Cialdini: The Psychology of Yes

Cialdini's *Influence* lists the principles that make people say yes. Each one has a home service use:

- **Reciprocity:** give first. A free inspection report, a fixed loose shingle or a useful guide.
- **Commitment and consistency:** small yeses lead to big ones. Get agreement on the problem before the price.
- **Social proof:** yard signs, reviews and "we did your neighbor's house."
- **Authority:** licenses, certifications, a printed book or workbook and a clear process.
- **Liking:** people buy from people they like. Find common ground before you inspect.
- **Scarcity:** a real crew schedule or a real deadline. Never a fake one.

Chet Holmes: Most Buyers Aren't Ready Yet

In *The Ultimate Sales Machine*, Chet Holmes describes a buyer pyramid: only a small slice of any market is buying now, a few more are open to it, and most aren't thinking about it yet. Most contractors chase the few who are ready and ignore everyone else. Educate the rest with content, newsletters and seasonal tips, so you're the obvious choice when they're ready. He also teaches pigheaded discipline: pick a few things and do them every week until they become habits.

Michael Gerber: Work on the Business, Not Just in It

The E-Myth Revisited explains why so many skilled tradespeople struggle as owners. The technician who's great at the work starts a business, then spends all day doing the work and none building the company. That's the "production people" problem from **promote every day**. Gerber's fix is to write systems so the business runs the same way every time: a script for the phone, a checklist for the estimate and a standard for the job site. Those systems are what let you hire, step back and grow.

Eugene Schwartz and Gary Halbert: Match the Market

In *Breakthrough Advertising*, Eugene Schwartz says you can't create desire, only channel what's already there. Match your message to how aware the customer is. Someone with a leak needs "same-day roof repair." Someone who's never thought about their roof needs "Is your roof older than 15 years? Here's what to check."

Gary Halbert asked his students what one advantage they'd want if they opened a hamburger stand. His answer: a starving crowd. Pick the market that's already hungry. After a hailstorm, in the first heat wave or with a new subdivision of first-time homeowners, the demand is already there. Your job is to be in front of it first.

Peter Drucker: The Purpose Is the Customer

Peter Drucker wrote that the purpose of a business is to create a customer, and that marketing and innovation are the two functions that produce results. Everything else is a

cost. For an owner, that means sales and marketing aren't extras you do when it's slow. They're the job.

Put It to Work This Week

1. Rewrite your main offer with the value equation: a result, proof, a fast start and less effort.
2. Add a guarantee that takes the risk off the customer.
3. Put a deadline and a tracking number on every flyer, mailer and ad.
4. Pick one add-on and one recurring service to offer on every job.
5. Write down your phone script and estimate checklist.
6. Start a monthly newsletter for every lead and past customer.
7. Count your lead sources. If there's only one, start a second this month.

Further Reading

- Alex Hormozi, *\$100M Offers* (2021) and *\$100M Leads* (2023)
- Jay Abraham, *Getting Everything You Can Out of All You've Got* (2000)
- Dan S. Kennedy, *The Ultimate Marketing Plan* and *No B.S. Direct Marketing*
- Seth Godin, *Permission Marketing* (1999), *Purple Cow* (2003) and *This Is Marketing* (2018)
- Robert Cialdini, *Influence: The Psychology of Persuasion*
- Chet Holmes, *The Ultimate Sales Machine* (2007)
- Michael E. Gerber, *The E-Myth Revisited* (1995)
- Eugene Schwartz, *Breakthrough Advertising* (1966), and Gary Halbert, *The Boron Letters*
- Peter F. Drucker, *The Practice of Management* (1954)

