

Home Service Speed-to-Lead Checklist

A free speed-to-lead checklist for home-service businesses that want to tighten response time across calls, web forms, chat, and text.

HVAC, plumbing, pest control, roofing, and general home-service teams

GUIDE

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WHAT THIS ASSET COVERS

- A 15-point checklist for calls, forms, chat, review response, and after-hours coverage
- A field for current-state score and target score
- Action prompts for what to fix first if the checklist exposes weak points

USE THIS WHEN

1. You want a team-ready audit that can be used in under 15 minutes
2. You are onboarding a new receptionist or dispatcher
3. You want to compare branches, seasons, or service lines

WORKING ASSET

Use this as a weekly front-door operating review for HVAC, plumbing, roofing, restoration, garage-door, and other field-service teams. The goal is to expose where demand is slowing down between first contact and booked work.

SCORING LOGIC

Score each line 0, 1, or 2.

- 0: broken, inconsistent, or owner-dependent

- 1: partially working but still risky
- 2: reliable, documented, and coachable

Suggested bands:

- 26-32: strong front door with normal optimization opportunities
- 18-25: vulnerable, with visible revenue leakage
- 0-17: urgent repair needed before buying more traffic

CALL-HANDLING STANDARDS

- Inbound calls are answered live during stated business hours.
- Missed calls trigger a text-back within 60 seconds.
- Emergency callers hear a real next step, not a dead-end voicemail.
- Dispatch or intake can separate urgent service from lower-value admin noise.
- Every call creates a visible record with service type, urgency, and location.
- After-hours answers capture enough detail to tee up the morning team cleanly.

WEB CONVERSION STANDARDS

- The primary call to action is visible above the fold on high-intent pages.
- Mobile pages show tap-to-call and text/contact options without extra scrolling.
- Forms ask only for fields needed to start the next step.
- Form submissions trigger an immediate confirmation plus a promised response window.
- Emergency visitors can identify urgency without guessing which option to choose.
- The thank-you state tells the prospect what happens next and who owns it.

HANDOFF STANDARDS

- Every lead has one named owner at any given time.
- Dispatch, office, and field teams see the same notes.
- Estimate requests have a scheduled follow-up date instead of a vague “call later.”
- Escalation paths are explicit for emergency work, VIP customers, and referral sources.
- No lead moves stages without a timestamp and accountable owner.

REVIEW AND PROOF STANDARDS

- Completed jobs trigger review asks in a defined operating window.

- New reviews are replied to quickly enough that the business looks active.
- Field teams know when they are supposed to invite reviews and when they are not.
- Recent photos, job proof, or location proof are added weekly.

FAILURE MODES TO FLAG IMMEDIATELY

- Calls ring out during lunch, shift change, or dispatch surge.
- Form leads sit unowned for more than 15 minutes.
- After-hours messages arrive without service type, address, or urgency.
- Emergency visitors hit a generic contact form with no urgent lane.
- Review requests are inconsistent, random, or sent to unhappy customers.
- The owner is still the fallback for basic intake cleanup.

7-DAY REPAIR SPRINT

Day 1: score the current flow and circle the five lowest-scoring lines.

Day 2: tighten missed-call recovery and after-hours messaging.

Day 3: reduce web-form friction and improve the confirmation state.

Day 4: assign ownership rules for every lead source.

Day 5: clean up escalation rules for emergency jobs and premium opportunities.

Day 6: install the review-request and reply rhythm.

Day 7: rerun the score and compare before/after gaps.

WEEKLY REVIEW QUESTIONS

- Where did response speed break down this week?
- Which lead source created the messiest handoff?
- Did any high-value opportunities wait behind low-value noise?
- Which single fix would make next week feel calmer and faster?

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Home Service Speed-to-Lead Checklist" become shared but unmanaged work.

- Use it with hvac, plumbing, pest control, roofing, and general home-service teams in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

BEST DEPLOYMENT SEQUENCE

- You want a team-ready audit that can be used in under 15 minutes
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WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A 15-point checklist for calls, forms, chat, review response, and after-hours coverage, A field for current-state score and target score, Action prompts for what to fix first if the checklist exposes weak points.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.