



# Contractor's Guide To An Amazing Customer Experience



CompanyCam



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Many times simply doing a great job and providing great results isn't enough for customers to feel like they have a great experience. There are many details that shape their expectations and perception of what a good customer experience should look like. And often these are not purely logical and rational factors, like price, quality of materials, or completing the job on time. In many cases, it's all about how a customer views their interactions with you as a service provider. At a core level, they want to know that you understand their needs and that you can solve their problems in a way that they feel comfortable.

**So we're offering up a few suggestions of practices that you can implement throughout your interactions with your customers to ensure that they say, "Hey, that was an amazing experience! I want to refer you to my friends and neighbors." →**

# #1 Give something away for free

Offer something “Free” to your prospects and complimentary items to your customers as a thank you.

“Free” can be a very powerful word. It can nudge your prospects into changing their behavior patterns in different ways. According to MIT professor and author Dan Ariely, people are more incentivized to accept free offers, in what is known as the ‘Zero Price Effect’. Basically, when customers pay for something, they carefully calculate the risks and obligations to avoid dissatisfaction or disappointment. But for free things, they have no expectations whatsoever. As a result, what you offer for free is associated with a higher value. This is because the risk of dissatisfaction in getting what you pay for is eliminated.

Additionally, people are driven by the principle of reciprocity- where customers feel obligated to respond to a gift with a positive reaction. According to Ariely, reciprocity is an extremely strong instinct. So, when a company does something for its customers, they feel a strong sense of doing something for them in return.

## What can you offer?

“Free” doesn’t have to be about price. In fact, it’s not wise to think of automatically discounting your services. Instead, you can offer something that makes your company stand out from the crowd and demonstrates your expertise or level of service. Here’s a few ideas:

- **Free consultation** - Sometimes homeowners really don’t understand the full scope of what needs to be done. They know that they have a problem- i.e. their roof leaks, but they don’t know the extent of the damage and how it might affect other structures. Here’s your chance to educate them and demonstrate your thorough understanding and best practices. Your time is valuable, so you can assign a monetary value to the consultation. For example, a 30 minute consultation is normally valued at \$75 but provided as a complimentary service for homeowners who (fill in the criteria).
- **Free upgrade** - Perhaps you highly recommend a certain type of materials over another brand. If it’s not cost-prohibitive, you can offer the preferred brand at the same price point as the other and highlight the performance of the preferred brand and why you recommend it.

- **Free mock-up** - Do you have visual tools to help your customers envision what it might look like when complete? They may appreciate having an Augmented Reality (AR) image of the final product. Even rough sketches can be helpful and inspire homeowners. Sometimes these rough sketches are seen as works of art and kept as keepsakes throughout the project.

- **Free checklist or guide** for your customers (like what you are reading now!)

Some ideas:

- How to Prepare Your Home for a Project (interior or exterior)
- What to Look for in a Contractor
- Ways to Save \$\$ and Where Not to Cut Corners.

These all help you stand out by demonstrating your expertise and attention to detail

- **Free tool or gadget** with your company logo to help maintain what was just done. This might be something small that you give upon completion of the job, like a magnet with a space to record service dates or a small flashlight to inspect small spaces, or a sample of a cleaning product. It shows goodwill that you want to help them keep their home in good condition and make it easy to get in touch with you.

Overall, it's not the value of what you give to them, it is all about demonstrating that you understand what they need and how you can help them in the process.

## #2 Educate your customers

Help your customer be the hero.

Think about the quote/proposal that you give to a prospective client for a moment. How much does it focus on your own company, why it's awesome, your price for the job, etc? Do you include any specific content that is about the client and how you can solve their problems? If not, that's a major problem. Your proposal is your opportunity to demonstrate that you understand what they need, and to help educate them so that they can drive success.

Donald Miller explains in Storybrand, "Customers don't generally care about your story; they care about their own. **Your customer should be the hero of the story, not your brand.**"

Miller unpacks it further. "Customers aren't looking for a hero, they are looking for a guide." In other words, you aren't Luke Skywalker in this story, swooping in to be the hero, you are Yoda. When Luke was overwhelmed, inexperienced and didn't know how to win the battle, he turned to Yoda, a guide that could lead the hero to success. As Yoda, it's your goal to help your customer figure out how to best solve the problem and direct them to the right tools and right people with the right expertise.

But instead of your proposal being all about your business, the products you use, your warranty details, the price that you're offering, etc., think about how you can change the focus to being on the client and demonstrate your ability to:

- Understand their home
- Identify with their challenges
- Provide solutions
- Reassure with social proof and relevant educational details

We recently heard this story from one of our customer's sales leaders:

One of his potential clients told him, "Your quote is a bit more expensive, but I'd like to move forward with your company. After seeing how detailed your quote is, I know you'll do a great job!" Now here's the ironic part: a competitor's quote was visible on the table and it actually went into FAR more detail than ours. It described all sorts of industry details that the salesperson hadn't bothered to mention. The difference? The quote from the competitor focused on details that a roofer would care about, but no homeowner would ever understand. The competitor's quote was generated in Word/Excel or some type of generic CRM system, showing a logo with a huge amount of text and a price. In contrast, the SumoQuote presentation was designed and built in such a way that it was intuitive and easy to understand. Our quote focused on the client, while the competitor's focused on themselves.

It's a great illustration that educating the client in exactly what THEY need is the key. Your proposal is the perfect way to start a consultative relationship that educates your customer and helps them feel like they are in the driver's seat all along the way.

## #3 Let your customer decide how to communicate with you

Email, text, phone, video, or ??

Everyone has a preference in the way we communicate. Some people count on efficiency and want to use as little words as possible, so they may rely on texting to get things done. Others like more of a personal connection and may have a number of questions that come up as part of a discussion, so they tend to pick up the phone.

And others are gathering information and want to be able to read all the details so they reach out via email.

As a contractor, it's important for you to be available in these different spaces and be able to respond quickly to leads, at different times of the day. If you are out on a job, it makes it tough to be accessible and respond appropriately as Speed to Lead is key to beating the competition. If you're not in a position to hire an office manager to answer all incoming calls, emails, texts, social media messages, referral notifications, you can outsource with a virtual assistant or use technology to help manage these communication channels.

In the Signpost app, you can set up automated responses to incoming communication that answers basic questions and directs leads to scheduling appointments with you. And as a mobile app, you can do it all from your phone.

Once you have your lead, SumoQuote can pick up the communication and provide options for clients to engage in creating and approving a dynamic proposal that includes details of how the job will run, solutions for high-risk areas of the job and options to give the homeowner choices on the products installed on their home. And once the contract is signed, customers can use their own personalized portal to track their project directly, sign quotes or change orders, and even connect with you via video chat, all in one place.

So ask your customers how they like to get updates and give them options for how they'd like to get estimates, job status updates, questions, and invoices.

## #4 Explain the process/what to expect

Let homeowners know what to expect from beginning to end.

When you're starting a project, it's critical that you remember you're stepping into someone's home. This is their space and they're trusting you and your team to leave it better than you found it. The biggest thing homeowners want from their contractor? Communication. No one wants to be left in the dark when it comes to work being done on their property.

Lay the foundation early by setting and sticking to your appointments for bidding and selling the job and keep the communication flowing all the way through the project. Let the customer know when your crew can be expected to arrive and depart each day. Make sure the places you have planned to keep equipment and dumpsters isn't problematic for them. Keep them up to date on when materials will be delivered and if the project timeline is changing.

It may seem like an undertaking to keep homeowners informed, but when you're taking the necessary photos and can rely on your crew to document and communicate thoroughly, you'll leave each job with a happy homeowner – and probably a few referrals in your back pocket.

CompanyCam put together a great resource for [standardizing your documentation](#) process. If you take these **25 photos** (although you should always be taking more than you think) you'll be in a great position to communicate with every homeowner and keep them informed the whole way through.

## #5 Demonstrate that you understand the customer's problem

Show them in words and pictures.

Odds are most homeowners aren't shingle experts and probably haven't spent much time inspecting their own roof. They're relying on you and your crew to advise them of the best course of action and are trusting your expertise.

Taking the time to properly document problem areas and educate the homeowner on just exactly why what they're seeing is a problem helps you build trust with your customers and establish a reputation as an honest and thorough contractor.

When bidding for a job, take more photos than you think you need. Start with the basic list from the resource sheet and then multiply it. Snap a picture of every instance of damage you see - you have unlimited photos and storage in CompanyCam so you might as well go crazy - and when you're off the roof, sit down with the homeowner and walk them through what you saw. You're their eyes and ears up on the roof, so the more information and context you can provide, the better.

And when you have a complex problem that you may not be sure how to address yourself, you can also quickly get expert advice from within your team who is out on another job so that the homeowner is not left waiting for an answer.

## #6 Check in during job

Check in throughout the duration of the project.

Keeping homeowners informed doesn't stop once you've sold the job. Giving customers regular updates on how the job is coming - and providing photos of the work you've gotten done so far - will keep you in their good graces and avoid those dreaded Karens.

The best way to do this? The [timeline link from CompanyCam](#). Once you've created a project for the job in your CompanyCam account and have started taking photos you can share a timeline link with the homeowner. You only have to share the link once and it will automatically update with new jobsite photos as they're taken. Homeowners can check it as frequently or infrequently as they'd like, but they know they have access to view the progress - another great way to keep that trust between you and the homeowner.

If you don't want to share every photo you take on the job with the homeowner, another great way to keep them updated is to create and [share a gallery in CompanyCam](#). Simply select the photos you'd like to share with the homeowner and then send them a link via text message or email. The gallery is branded with your company logo and cleanly laid out with details on when each photo was taken, so customers can see how the job is moving forward.

## #7 Leave a clean jobsite

Before and after, and all around.

Always, always, always leave a jobsite better than you found it. The easiest way to ensure your crews do this every time? Bake it into your documentation process.

Start each job by thoroughly documenting what the jobsite looked like when you started work. Take pictures of the driveway, gutters, siding, windows, even landscaping. This way, when you leave a project you can look back and have peace of mind that your crew didn't cause any damage. Heavy equipment like dumpsters can easily be blamed for cracked driveways, but if you have proof of what the driveway looked like before you parked your dumpster there you'll be able to plead your case and won't be held responsible for damage you didn't cause.



Make sure to ask ahead of time if there are any areas or pre-existing damage you and your crew need to be aware of and document those things in the project notes, that way you know everyone who steps foot on the job is informed.

When you pack up on that final workday, be sure to shoot a gallery of the site cleaned up over to the homeowner and let them know you're done. This shows the homeowner that you value their time and treat their property like you would your own.

## #8 Provide an easy-to-read invoice

Keep it simple. When your customer understands what they're buying, they feel empowered.

Take a fresh look at your invoices. Do you use any item descriptions or abbreviations that an average person would not understand? Do you note units of measure? Do the price and deliverables in your invoice match the proposal they agreed to? Are any changes within the scope of the job well-documented? Does the customer have easy access to the communication throughout the job process to eliminate the question marks and bolster trust?

When you have all of your quotes, change orders, etc. in one place, it's easy for you to convert them accurately into an invoice at the click of a button. And with the consistent data and ongoing communication, it helps eliminate any surprises for your customers, so they know exactly what to expect and get paid faster. You can ensure that the invoice won't get "lost" by presenting it to the customer in the same way that you've been communicating all along, whether it's by email, texting, or through the portal. Plus, with a QuickBooks integration into SumoQuote, you can automatically hand it off to the Finance team.

## #9 Make it easy for customers to give feedback when job is complete

Feedback and reviews are essential

Why is feedback important? It's an opportunity for your team to learn from each customer service experience what's working and what isn't. And good feedback in the form of **online customer reviews can help boost your online presence and visibility** so that future prospective customers can find you and understand the level of service you provide.

So when customers get excited about the improvements made to their home, you need to capture that feeling and emotion when it's fresh to get an online review. Tell them upfront during the job that you want to deliver a 5-star experience and ask them to confirm their satisfaction along the way. This also gives you a chance to make things right, before the job is complete and the customer makes their final inspection.

Once the job is finished, you can automate the request for a review once the invoice is submitted or even before. This takes the burden off of everyone on your team so that you don't have to remember to whom you've sent a request. There are many ways to get reviews if you plan ahead and make it a regular part of your customer interaction. For a list of creative ideas, [Get 20 Hacks to Get More Reviews.](#)

Looking to get Google reviews? [Here's a step-by-step guide.](#)

Make it easy and use the communication style they prefer. Give them a link via text, email or chat to the review platform you wish to populate with a friendly note so all they have to do is click the link and type. And be sure to respond right away to each review to let them know you are actually listening and you appreciate them as a customer.

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## How CompanyCam, SumoQuote and Signpost help you create an amazing customer experience.

Together, these three apps help create a seamless customer experience. Signpost helps convert leads to customers by helping contractors use reviews to stand out. CompanyCam helps customers better understand what needs to be done: when, where and why in a visual format. SumoQuote helps contractors make an impression with their customers from the get-go and use the CompanyCam images before, during and after the job to provide estimates and inform customers about the job status. And when the job is complete, they help document that all has been delivered as promised, help personalize the invoicing process and set the stage for referrals to other customers. These tools help you manage the small details that often make the difference between a good and great customer experience.



CompanyCam is the #1 app for contractors to build trust between your crews and with your customers.

Using CompanyCam, you and your crews can take unlimited jobsite photos that are instantly location and time stamped, stored securely in the cloud - not on your phone - and available to your whole team. This gives you the ability to keep an eye on progress from anywhere, answer questions as they arise, and most of all: keep customers informed and happy while the project is underway.

With an extensive feature suite, CompanyCam makes it easy to capture photos and videos in the field, share and store them securely, annotate and add context to the problem, and even send out real-time updates to customers via the timeline link. There's even more at [companycam.com/features](http://companycam.com/features), so check it out!

**Try CompanyCam Pro FREE for 14 days when you sign up at [companycam.com/customer-experience-matters](http://companycam.com/customer-experience-matters).**



Your quotes should work as hard as you do. With SumoQuote, making an impression and winning jobs has never been easier. Pick your pages, add your numbers and insert custom content to create impressive quotes that stand out.

Add pages quickly by toggling them on. Then use templates to work faster, and keep your quotes sharp and consistent. Insert photos and mark them up. Or keep life simple, and add them right from your CompanyCam account. With a few custom marketing pages, your quote becomes a complete sales presentation, so you can leave those 20-page brochures at home. Finally, SumoQuote lets you get that quote e-signed without a 30-minute drive across town.

Say goodbye to bulky Word documents and boring spreadsheets. SumoQuote is the quoting tool that leaves big impressions and gets hefty results.

**Try SumoQuote for free at <https://www.sumoquote.com/try-for-free/>.**



Signpost offers the leading customer communication software for contractors to help get the lead, get the job, and get the review. It's purpose-built for home service businesses like yours to help you manage your customer communications – from lead to customer to repeat business. With Signpost, you get found online with great reviews on Google, Facebook and helps drive engagement from those leads. The app helps you text, chat, and email with prospects and customers at important touchpoints. And it also helps drive future revenue from existing customers through remarketing programs.

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