



Your 5-Star Customer Experience Checklist

To get 5-star reviews, more repeat business and more referrals, you must deliver a seamless “WOW” customer experience from beginning to end. Check out the below, then customize your clients’ experience.

gFour Marketing can supercharge your client experience today. Find out how at www.gFourMarketing.com/CustomerExperience



Pre-Sale

- 1** Answer your phone! (SO important.)
- 2** Your call center is warm and friendly while screening the caller to ensure your company is the best fit to service their needs.
- 3** Consultation with Mr. & Mrs. Homeowner is ideally set within 48 hours with all decision makers present. (This is the best experience for them so you can limit the time that would be required with multiple visits.)
- 4** Mr. & Mrs. Homeowner receive email and text communication confirming their consultation appointment. Ideally, you would introduce them to the sales representative that will be coming out to visit them.



During the Sale

- 5** The day before the appointment, Mr. & Mrs. Homeowner receive phone call, email and text communication letting them know who will be arriving, when and what to expect.
- 6** Salesperson arrives ON TIME - 10 minutes early is ideal.
- 7** Salesperson is presentable - well-groomed, neatly dressed in company-branded clothing and arrives in a clean company-branded vehicle.
- 8** Salesperson enters with an iPad/tablet sales presentation and minimal (if any) paperwork.
- 9** Salesperson enters home with all proper PPE (mask, gloves, booties).
- 10** Follow up steps are clearly established and completed within 24 hours.
- 11** Salesperson sends a thank you email and handwritten note to Mr. & Mrs. Homeowner thanking them for their time - whether they buy or not.



Post-Sale/Pre-Install

- 12** Mr. & Mrs. Homeowner receive a Thank You & Welcome packet with what to expect from their installation.
- 13** Mr. & Mrs. Homeowner receive weekly calls from your company updating them on the status of their installation.
- 14** If they will have to wait more than 6 weeks until install, Mr. & Mrs. Homeowner receive email and direct mail communication.

Keep Going!

Installation

- 15 Project manager arrives the day of installation at least 15 minutes early.
- 16 Scope of work is reviewed and approved one final time by Mr. & Mrs. Homeowner.
- 17 All employees and subcontractors on site MUST: be clean, well groomed, neatly dressed, wear appropriate PPE and not smoke on-site.
- 18 All nearby areas and valuables are properly covered and protected.
- 19 Measurements and specs are carefully confirmed before any work begins.
- 20 Any expectations regarding loud noises, people coming and going, access needed to the home and start and stop times are very clearly communicated to Mr. and Mrs. Homeowner.
- 21 Make sure Mr. & Mrs. Homeowner have the Project Manager's phone number in case any issues arise.
- 22 Project Manager introduces him/herself to neighbors to keep them informed and provide a business card in case of any issues (also a great marketing opportunity!).

Post-Installation

- 23 The surrounding area is thoroughly cleaned post-install to look even better than it did before.
- 24 The Project Manager reviews the completed project with Mr. & Mrs. Homeowner to ensure they are thrilled.
- 25 A few days later, an outbound "happy" call is made to ensure Mr. & Mrs. Homeowner are still happy with the completed job. They ask what could have been done better.
- 26 Either send or deliver the homeowner a gift to show your appreciation for their choosing to do business with you.
- 27 Ask the homeowner for a 5-star Google review.
- 28 Introduce the homeowner to your referral program, and describe how it works.
- 29 **KEEP IN TOUCH!** → This is the secret to long-term customer relationships and profits for your business!



Make systematic profits from that customer for years to come with gFour Marketing's 1into5 Program! Find out more at

www.gFourMarketing.com/CustomerExperience

