Trust-Building Checklist

Use this checklist to make sure every job builds trust and leaves customers eager to work with you again.

Stage	Action 1	Action 2	Action 3
Before the Job	Confirm job details	Arrive 10 minutes early	Greet customer politely
During the Job	Explain process in plain language	Maintain clean workspace	Show courtesy to neighbours
After the Job	Show results	Ask for feedback	Follow up within 7 days

Follow-Up Script Sheet

Use these ready-made scripts to follow up with customers after a job. Adjust wording to suit your style and trade.

Type	Script
Phone Script	Hi [Name], just checking in to make sure everything is working well after the job. Is there anything else you need?
Email Template	Subject: How's everything going with your [Service]? Hi [Name], I just wanted to follow up to make sure everything is working perfectly. If you have any questions or need anything, I'm here to help. Thanks again for choosing us! [Your Name]
SMS	Hi [Name], just checking in after the job last week – all good?

Customer Feedback Form

Gather structured feedback from your customers to identify strengths, improvements, and potential referrals.

Question	Response
How satisfied were you? (1–5)	
What did we do well?	
What could we improve?	
Would you recommend us? (Y/N)	
Permission to use your review publicly? (Y/N)	

Self-Reflection Weekly Review

Use this sheet once a week to review your customer retention, referrals, and areas for improvement. Consistency is key to steady growth.

Prompt	Your Notes / Responses
1. How many repeat customers this week?	
2. How many referrals received?	
3. Wins to celebrate?	
4. Problems to fix?	
5. One small action for next week?	

Referral Machine Worksheet

Use this worksheet to track and encourage customer referrals. Record who referred you, what incentive was given, and ensure you follow up with a thank-you.

Date Asked	Referrer Name	New Customer Name	Incentive Given	Status	Thank-You Sent?

Lifetime Customer Value (LCV) Calculator

Calculate the long-term worth of each customer to see how valuable retention can be for your business.

Formula: LCV = Average Job Value × Jobs per Year × Retention Period (Years)

Average Job Value ($)	Jobs per Year	Retention Period (Years)	LCV ($) 10	Loyal Customers Value ($)

Customer Retention Tracker

Track your clients, follow-ups, and loyalty program status to keep valuable customers coming back.

Customer Name	Contact Details	Job Date & Description	Follow-Up Date & Outcome	Loyalty Status	Notes