

5 Systems Every Home Services Business Should Have Running

Real tools. Real steps you can take today. No fluff, no gatekeeping - just what we'd hand any contractor who asked us where to start getting their time back.

5+ hrs/week

\$50,000+/yr

Speed wins

Here's the deal.

Most home services business owners work 45+ hours a week. Over a third of that time goes to admin - returning calls, chasing invoices, sending reminders, following up on leads that already went cold.

The irony? These are the easiest problems to solve. They follow patterns. They happen the same way every time. And once you have the right system in place, they take care of themselves.

This playbook covers 5 systems that make the biggest difference for contractors, plumbers, electricians, HVAC techs, and other home services businesses. For each one, we'll show you:

- **The problem** - why it's costing you more than you think
- **What the solution looks like** - step by step
- **The tools** - real options at three tiers you can look up yourself
- **A quick start you can do today** - free, no setup required

Some of these you can put in place yourself in an afternoon. Others you might want help with. Either way, you'll walk away knowing exactly what's possible and where to start.

A note on numbers: The scenarios and estimates in this playbook are illustrative - based on reasonable assumptions about a typical home services business. Your actual results will depend on your situation, your market, and how these systems are put in place. Nothing here is a guarantee. Use these as a starting point for thinking through what's possible, not as a promise of what you'll see.

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Easy

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Medium

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Medium

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Advanced

+

Bonus: Estimate Follow-Up

Easy-Medium

1

Missed Call Auto-Text Response

Easy - Set up in under an hour

Most callers

hang up without leaving a voicemail

Scenario: \$50,000+/yr

in potential missed revenue

First to respond

almost always gets the job

The Problem

You're elbow-deep in a water heater install. Your phone rings. You can't answer. The caller doesn't leave a voicemail - most don't. They call the next plumber on Google. By the time you check your phone at lunch, that \$400 job is gone.

Here's a simple scenario: if you're missing 10 calls a week, and 3 of those callers would have booked at a \$400 average job, that's roughly \$1,000 in potential revenue per week - or about \$50,000 a year that never had a chance to convert. Your actual conversion rate and average job value will differ. Run the math on your own numbers and see what you get.

Customers consistently hire whoever gets back to them first. A 30-second automated text when you miss a call keeps you in the conversation - instead of losing the job to whoever picked up.

What It Looks Like Automated

1. Customer calls your business number
2. You're on a job, in a meeting, or it's after hours - you can't pick up
3. Within 30 seconds, the caller gets an automatic text:

"Hey! Sorry we missed your call. We're with a customer right now but didn't want to leave you hanging. What can we help with? We'll get back to you ASAP."

4. The customer texts back describing their issue
5. You reply when you're free - but the conversation is already started, and you're ahead of competitors who never responded
6. The missed call gets logged so nothing falls through the cracks

Tools

BUDGET OPTION

OpenPhone - Built-in missed call auto-text. Includes business phone number, texting, and voicemail transcription. Easiest path to get this working.

Alternative: **Grasshopper** - Virtual phone system with instant response texting.

MORE CONTROL

Twilio + an automation platform like **Make.com** or **n8n**. Detects missed calls and triggers custom texts automatically. More setup involved, but very cost-effective at scale and fully customizable.

ALL-IN-ONE

GoHighLevel - Missed call text-back is built in, plus CRM, review requests, scheduling, and more. Overkill for just this, but great if you're stacking multiple systems.

Note: If you're using Google Voice, it does not support auto-reply to missed calls. You'll need an option like one of the tools above.

DIY Quick Start (Free, Do It Today)

- **Android:** Enable "Auto-reply" in your Do Not Disturb settings. Set a custom message that goes out when you're on a job. Free and works today.
- **iPhone:** Use the "Driving Focus" mode (Settings > Focus > Driving) and customize the auto-reply message. Turn it on manually when you're on site.
- **Both:** Change your voicemail greeting to: *"Can't take your call - text me at this number and I'll get back to you within 30 minutes."* This alone recovers a surprising number of leads.

2

Post-Job Review Request Sequence

Easy-Medium - 1-2 hours to set up

Most satisfied customers

won't review without being asked

Consistent asking

compounds into a meaningful review lead over competitors

Reviews build trust

before you even talk to a prospect

The Problem

You finish a job on Friday. The customer is thrilled - they even said "I'll leave you a great review!" But by Monday, life happened. They forgot. You forgot to follow up. That 5-star review evaporated.

Meanwhile, the one customer who was unhappy left a 1-star review on their own - because dissatisfied customers are more likely to follow through without prompting. Your rating slowly drifts downward, and the positive reviews that should be there simply aren't.

This system isn't primarily about saving time - it's about building a consistent volume of reviews that actually reflects how good your work is. The business that asks after every job ends up with 10x the reviews of the competitor who doesn't. That difference shows up every time someone is choosing between you.

What It Looks Like Automated

1. You mark a job as "complete" (or send a trigger text)
2. Within 1-2 hours, the customer gets a text:

"Thanks for choosing [Your Business]! If we earned it, would you mind leaving a quick review? It really helps. [Direct Google Review Link]"

3. The link goes directly to your Google review form - one tap to leave a review, no searching
4. If no review after 2 days, a gentle follow-up email goes out:

"Hey [Name], just wanted to make sure everything's still looking good with the work we did. If you have 30 seconds, a Google review means the world to a small business like ours."
5. If they do leave a review, the sequence stops automatically - no annoying double-asks

Tools

BUDGET OPTION

Google Business Profile (free) for your review link + a workflow tool like **Make.com** or **Zapier** + an SMS service like **Twilio** to trigger review request texts from a Google Sheet. Very low cost to run.

PURPOSE-BUILT

NiceJob - Automated review requests via text and email. Integrates with Jobber, Housecall Pro, and others. Typically drives a meaningful increase in review volume.

BUILT INTO YOUR SOFTWARE

Jobber and **Housecall Pro** include automated review requests in higher tiers. If you're already on one of these, check if this feature is available in your plan before buying something new.

DIY Quick Start (Free, Do It Today)

1. Go to your Google Business Profile and click "Ask for reviews" to get your direct review link
2. Save that link in your phone's notes
3. Create a text template: *"Thanks for choosing us today! If you have 30 seconds, a quick Google review helps us a ton: [link]"*
4. Send it to every customer within 2 hours of completing a job. Response rates are much higher when you reach out right after the job vs. days later.
5. **Pro tip:** Ask while you're still on site wrapping up. "Mind if I text you a review link? Takes 30 seconds." Face-to-face ask + immediate text = highest conversion.

3

Instant Lead Follow-Up from Your Website

Medium - A few hours to set up

Jobs lost silently

to whoever responded first

Dramatically higher

conversion when you respond first

Most leads

go unanswered - be the exception

The Problem

Someone finds you on Google at 9 PM. They fill out the "Request a Quote" form on your website. You see it the next morning at 7 AM - 10 hours later. By then, they've submitted the same form to three other contractors, and two of them already responded.

You call. It goes to voicemail. You never hear back. That \$2,000 bathroom remodel went to the guy who responded at 9:03 PM with an automated text saying "Got your request - let's set up a time to talk."

Speed is the differentiator. Responding in minutes while competitors respond in hours - or not at all - is one of the simplest ways to win more jobs without spending more on marketing.

What It Looks Like Automated

1. Customer fills out your website form (name, phone, email, what they need)
2. Within 60 seconds, they get a text:

"Hey [Name]! Got your request. We'd love to help. Are you available for a quick call tomorrow morning, or would you prefer we text you a few questions to get started?"
3. Simultaneously, they get an email confirmation with your business info and what to expect next
4. You get an instant notification on your phone: "NEW LEAD: [Name] - [Service] - [Phone]"
5. The lead is logged in a spreadsheet with timestamp, source, and status
6. If you haven't followed up within 2 hours, you get a reminder
7. If the lead hasn't responded after 24 hours, a follow-up text goes out automatically

Tools

BUDGET OPTION

Your **website form** (Formspree, Jotform, or built-in) + **Make.com** or **Zapier** (both have free tiers to start) + **Twilio** for SMS + **Google Sheets** (free). The automation watches for new submissions, sends the text, logs to Sheets, and notifies you.

MORE POLISHED

Add **Calendly** (free plan) to the auto-response so leads can self-schedule. Add **Brevo** (free tier) for the email confirmation. These make the follow-up feel more professional with minimal extra cost.

ALL-IN-ONE

GoHighLevel or **Jobber/Housecall Pro** (higher tiers) - form builder, auto-responder, SMS, email, pipeline tracking all in one. More to learn, but everything works together out of the box.

DIY Quick Start (Free, Do It Today)

1. Set a unique notification sound for form submission emails so you hear them instantly
2. Create a "speed template" in your phone's text app - a pre-written response you can paste and personalize in 10 seconds
3. Set a rule for yourself: respond to every web form within 15 minutes during business hours. This single habit change will noticeably increase your close rate.
4. Add a free Calendly link to your email signature so leads can book themselves

4

Appointment Confirmation & Reminder System

Medium - A few hours to set up

3-5 hrs/week

saved

Significantly fewer

no-shows

Most no-shows

simply forgot

The Problem

You booked a furnace tune-up for Thursday at 10 AM. You confirmed over the phone last week. Thursday morning, you drive 25 minutes to the house. Nobody's home. You call - "Oh, I totally forgot! Can we reschedule?"

That's 25 minutes of drive time wasted each way - time and fuel you can't get back. The job slot sits empty for the day, and unlike a cancellation you see coming, a no-show leaves no window to fill it with something else. If this happens 2-3 times a week, you're burning hours in unnecessary drive time and leaving real revenue on the table every month.

Most no-shows aren't customers who changed their mind - they simply forgot. A timely reminder catches the majority of these before they become a problem.

What It Looks Like Automated

1. You book an appointment (in Google Calendar, Calendly, Jobber, etc.)
2. Immediately: customer gets a confirmation text and email with date, time, and your contact info
3. 2 days before: reminder text -

"Hi [Name], just a reminder about your [service] appointment on [Day] at [Time]. Reply C to confirm or R to reschedule."

4. Customer replies "C" - confirmed, status updates automatically
5. Customer replies "R" - they get a link to reschedule, and the time slot opens back up
6. Morning of: one more reminder -

"See you today at [Time]! Please make sure [prep instructions - clear area, pets secured, etc.]"

7. All confirmations are tracked. You see at a glance who's confirmed and who hasn't.

Tools

FREE / LOW-COST

Calendly (free plan) includes automated email reminders and confirmations. **Google Calendar** (free) + **Make.com** or **Zapier** (free tiers) + **Twilio** for custom text reminders. Very low monthly cost for most businesses.

PURPOSE-BUILT

Apptoto - Text, email, and voice reminders. Interactive confirmations (reply C/R). Integrates with Google Calendar and Outlook.

GoReminders - Simple SMS reminders, good for small teams.

BUILT INTO YOUR SOFTWARE

Jobber, **Housecall Pro**, and **ServiceTitan** all include appointment reminders. Check your current plan before buying a separate tool.

DIY Quick Start (Free, Do It Today)

1. Start using **Calendly** (free) for booking. It sends automatic email confirmations and reminders with zero setup.
2. Create a text template: *"Hi [Name], confirming your [service] appointment for [Day] at [Time]. Reply YES to confirm or call us to reschedule: [number]"*
3. Send it to every customer 48 hours before their appointment
4. For morning-of reminders, include prep instructions (clear the area, secure pets, etc.) - this reduces on-site delays too

Weekly Business Summary Dashboard

Advanced - Half a day to set up, worth every minute

2-3 hrs/week

saved

Spot problems early

instead of at end of month

Over a third

of the work week goes to admin

The Problem

It's the end of the month. Your accountant asks how many jobs you ran. You guess. She asks about your close rate on estimates. You shrug. Revenue? "I'll check my bank account."

You're running a business on gut feel. You know you're busy, but you don't know if you're profitable, which marketing channels are bringing in work, or whether your callback rate is getting better or worse. You find out you had a bad month when the bank balance drops - by then it's too late to fix.

Businesses that track their numbers weekly catch problems early - before a dip in close rate or rising no-shows become expensive.

What It Looks Like Automated

1. Throughout the week, data from your business tools feeds into a central Google Sheet automatically - new leads, jobs completed, revenue collected, reviews received

2. Every Monday at 7 AM, you get an automated email:

"Last week: 12 new leads, 8 jobs booked (67% close rate), 6 completed, \$4,200 revenue, 5 new Google reviews (avg 4.8 stars)"

3. Numbers are compared to the previous week and your monthly average

4. A simple dashboard with charts updates automatically - glance at it anytime

5. Optional alerts:

"Heads up: your lead volume dropped 40% this week vs. your 4-week average"

Tools

CORE OPTION

Google Sheets (free) for the dashboard. An automation platform like **Make.com**, **Zapier**, or **n8n** pulls data from your tools and pushes it to the Sheet weekly. **Gmail** or **Brevo** (free tier) sends the Monday summary.

VISUAL DASHBOARDS

Google Looker Studio (free) connects to your Sheets and creates polished visual dashboards with charts and graphs. **Databox** (free plan, 3 data sources) is another solid option.

DATA SOURCES

Data comes from whatever you already use: **Google Business Profile** (reviews), **Stripe/Square** (payments), **Google Calendar** (appointments), your CRM, or even just a simple Google Form your team fills out after each job.

DIY Quick Start (Free, Do It Today)

1. Create a Google Sheet with columns: Week Ending, New Leads, Jobs Booked, Jobs Completed, Revenue, Reviews Received
2. Every Friday afternoon, spend 10 minutes filling in last week's numbers. Pull from your bank account, calendar, and Google Business Profile.
3. After 4 weeks, you'll have trend data. You'll start noticing patterns you never saw before.
4. This manual version takes 10 minutes/week. Once you see the value, automating the data collection is the natural next step.



Bonus: Automated Estimate Follow-Up

Easy-Medium - 1-2 hours to set up

1-2 hrs/week

saved

Faster estimate

acceptance with a follow-up

Most contractors

send an estimate and wait

The Problem

You spend 30 minutes driving to a house, assessing the job, and putting together a fair estimate. You send it over. Then... nothing. You mean to follow up, but you get busy. A week later you remember and call - they already hired someone else. Or worse, they were going to say yes but just forgot to respond.

Most estimates that go unanswered aren't "no" - they're "I got busy." A simple follow-up sequence converts a meaningful chunk of those into booked jobs.

What It Looks Like Automated

1. You send an estimate (email, text, or through your invoicing tool)

2. Day 2: Automatic text -

"Just checking in - any questions about the estimate we sent over?"

3. Day 5: Follow-up -

"Wanted to make sure this didn't get buried. Ready to get this scheduled?"

4. Day 10: Final touch -

"Last check-in - if you've decided to go another direction, no hard feelings. But if timing was the issue, we're here when you're ready."

5. If they respond at any point, the sequence stops and you take over personally

DIY Quick Start (Free, Do It Today)

1. Set a phone reminder for 3 days after sending every estimate
2. Send a simple text: *"Hey, just checking if you had any questions about the estimate"*
3. You'll be surprised how many people respond with "Oh yeah, let's do it!" - they just needed a nudge

The Bottom Line

TIME BACK EACH WEEK

5+ hrs/week

From appointment reminders and automated tracking alone - time currently going to manual follow-ups, chasing confirmations, and pulling numbers by hand. Systems 4 and 5 are primarily about reclaiming your time. The others are about something different.

REVENUE OPPORTUNITY

Scenario: \$50,000+/yr

From missed calls alone - based on the System 1 calculation: 10 unanswered calls per week, 3 that would have booked, at a \$400 average job. Systems 1, 3, and the bonus are less about saving time and more about jobs you're currently losing without realizing it. Plug in your own call volume and job value to see what the number looks like for you.

Most of these systems are things you can set up yourself - the DIY quick starts in each section will get you moving today. For businesses ready to go further, stacking several of these creates a compounding advantage over competitors who aren't doing any of it.

You now have a clear picture of where the biggest opportunities are - and real steps you can take right now.

Want to Talk Through Which of These Would Make the Biggest Difference for Your Business?

Everything in this playbook is something you can set up yourself. If you'd like help figuring out which of these will actually move the needle for your specific situation, we're happy to think it through with you.

Tool Quick Reference

Tool	Type	Free Tier?	Best For
Make.com	Automation	Yes	Connecting tools and automating multi-step workflows
n8n	Automation	Yes (self-hosted)	Workflow automation - more technical, very flexible
Zapier	Automation	Yes	Workflow automation - easier to start than Make.com
Twilio	Phone / SMS	Pay-per-use	SMS and voice automation at low cost
OpenPhone	Phone / SMS	No	Business phone number with missed-call text-back
Calendly	Scheduling	Yes	Appointment scheduling with automatic confirmations
Apptoto	Scheduling	Trial only	Appointment reminders via text, email, and voice

Tool	Type	Free Tier?	Best For
GoReminders	Scheduling	Trial only	Simple SMS appointment reminders
Google Business Profile	Reviews	Yes	Your Google listing, reviews, and local search
NiceJob	Reviews	Trial only	Automated review request sequences
Jobber	Field Service	Trial only	Scheduling, invoicing, and CRM for field service
Housecall Pro	Field Service	Trial only	Scheduling, invoicing, and CRM for field service
Google Sheets	Reporting	Yes	Custom dashboards and data tracking
Google Looker Studio	Reporting	Yes	Visual dashboards connected to your data
Brevo	Email	Yes	Email sequences and automated follow-ups
GoHighLevel	All-in-One	Trial only	CRM, phone, SMS, and automation in one platform

Tool disclaimer: The tools listed here are examples based on what's commonly used for these types of systems. We don't endorse any specific tool - every business should evaluate options independently to confirm they're the right fit, that pricing works for your budget, and that you understand what you're committing to before signing up. Free tier availability confirmed as of early 2026 - plans and features change regularly, so verify with each provider directly before committing.