

TO YOUR  
*Success*<sup>®</sup>



# Building the Ultimate Customer Loyalty & Retention Program

A GUIDE FOR THE HOME SERVICES INDUSTRY



# Customer Retention And Your Bottom Line

## HOW MUCH IS CUSTOMER RETENTION WORTH?

If you're in the home services industry, you know that attracting new customers is only half the battle in building a successful business. Retaining customers who are loyal is also vital to the longevity and profitability of your HVAC, plumbing, pest control, electrical, or other home service company. After all, there are a limited number of new clients in your specific geographic market, so repeat customers are needed to create regular cash flow. Loyal customers also increase the value of your company.



Increasing customer retention rates by 5% can increase a company's profits by 25% or more.

*Source: Harvard Business School*

The average customer acquisition cost for contractors is \$483 per customer. Comparatively, an effective retention program costs as little as \$30 per customer.

*Source: To Your Success Contractors Survey*

It costs organizations 5 to 8 times as much to acquire a new customer as it does to retain a current customer.

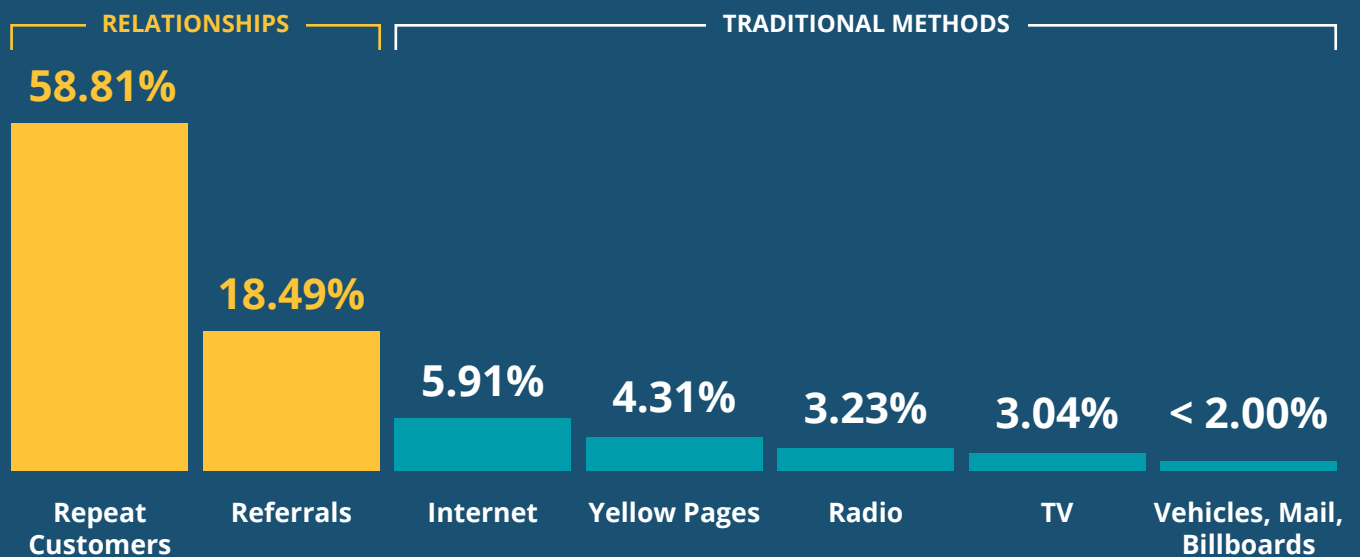
*Source: Lee Resources, Inc.*



## Relationships Matter

Successful home services contractors continually tell us that repeat and referral business are main drivers of revenue and growth. That experiential proof is reinforced through hard data as well. To Your Success collects customer feedback for home services contractors nationwide. A recent examination of 100,000 consumer responses from December 2000 through December 2017 indicates that the main sources of a contractor's business hinge on strong relationships.

*To Your Success National Home Services Survey Data*



When you combine the above data with the comparison of customer acquisition vs. retention costs, we learn that not only are repeat customers your **PRIMARY** source of business, but they're your **MOST ECONOMICAL** as well.

# IS YOUR COMPANY TRACKING AND BUILDING CUSTOMER RETENTION?



## Start With This Quick Assessment

1	You may be tracking the new customers coming in the front door, but how many are slipping through the back door? Do you have a process in place to let you know when a customer cancels a maintenance agreement or fails to schedule more service within a year of initial engagement?	<input type="checkbox"/> Yes <b>2 PTS</b>
		<input type="checkbox"/> No <b>0 PTS</b>
2	What are you doing to build customer satisfaction and loyalty? Do you send customers gifts, thank you notes, coupons, or other signs of appreciation?	<input type="checkbox"/> Customers receive some kind of thank you after every interaction. <b>2 PTS</b>
		<input type="checkbox"/> Only top-tier customers receive a thank you. <b>1 PT</b>
		<input type="checkbox"/> Customers do not receive any type of thank you, only a bill. <b>0 PTS</b>
3	How are you letting customers know they are heard, valued, and appreciated?	<input type="checkbox"/> We survey every customer. <b>2 PTS</b>
		<input type="checkbox"/> We occasionally happy-call. <b>1 PT</b>
		<input type="checkbox"/> We do not track feedback. <b>0 PTS</b>
4	Referrals are the second leading source of business for contractors nationwide. When customers refer new business your way, do you reward with a thank you gift or other tangible expression?	<input type="checkbox"/> We reward every referral that results in new business <b>2 PTS</b>
		<input type="checkbox"/> We only reward referrals that result in high-dollar new business <b>1 PT</b>
		<input type="checkbox"/> We do not reward referrals <b>0 PTS</b>
5	How much of your annual revenue do you reinvest in customer retention and loyalty?	<input type="checkbox"/> 3-4% <b>2 PTS</b>
		<input type="checkbox"/> 1-2% <b>1 PT</b>
		<input type="checkbox"/> I'm not sure. <b>0 PTS</b>

## HOW DID YOU DO?

**0-3 Points** Red alert! Get help immediately.  
**4-7 Points** You can do better!  
**8-10 Points** Congratulations, your customers should love you!

**TOTAL SCORE**



# The Numbers Behind Customer Satisfaction

## THE IMPACT OF CUSTOMER EXPERIENCE



### DELIGHTED CUSTOMERS

#### Happy Customers Are Great Advertisers

- ✓ 87% of customers who have a good experience will share that with others.
- ✓ 33% of happy customers will share with 5 or more people.
- ✓ 30% will share their positive experience on social media.



### NEUTRAL CUSTOMERS

#### Neutral Customers Can Be Swayed

Don't make the mistake of overlooking customers who feel neutral about your service. They like you enough to remain a paying customer for now, but they could easily be swayed to a competitor if given the right opportunity. When you engage with every single customer and offer them an opportunity to provide feedback, you can move a neutral customer to the fan zone.



### FRUSTRATED CUSTOMERS

#### Unhappy Customers Tarnish Your Reputation

- ✗ 95% of customers who have a bad experience will share that with others.
- ✗ 54% of unhappy customers will share with 5 or more people.
- ✗ 45% will share their negative experience on social media.

SOURCE [ZENDESK](#)

Delighted customers not only provide a stable financial base, they also generate new business through word-of-mouth referrals and positive online reviews. However, many companies fail to recognize the impact of unhappy customers who are more likely to share their experience than the satisfied customer.

*Many owners and managers struggle to find a consistent customer satisfaction formula that works. The good news is there are effective tools and strategies you can use to bake customer loyalty and retention into your processes and culture, resulting in repeat business, raving reviews, and referrals that boost your bottom line. By ensuring that every customer experience is positive and responding quickly to any negative feedback, you will build a level of customer loyalty and retention that will help your company thrive.*



# Stand Out from the Competition: Build an Engaging Customer Retention Program

## WELCOMING CUSTOMERS TO THE FAMILY: BUILDING A CONNECTION

Retaining new customers requires more than just providing excellent products and outstanding service. Customers need to feel like they have an ongoing relationship with your company in order to remain loyal. Consider some of the ways you can stand out from the competition:

▶ **Go beyond automated postcards or salesy trinkets.** Sending a treat of food that feels home-made goes much further to create a warm and memorable customer connection.

▶ **Reach out to every customer.** Every customer can lead to new business, so make sure each customer feels appreciated.

▶ **Respond quickly to concerns and complaints.** If a customer calls to voice a complaint, of course you work to resolve it quickly. But, do you have way to keep a pulse on negative feedback in customer surveys? Today's technology is capable of monitoring negative comments in real-time and sending you alerts. Many reporting systems also offer the ability to see negative feedback by department, time period, or team member.

3 KEY TOOLS

1. GIFTS   2. SURVEYS   3. MANAGEMENT OF ONLINE REVIEWS

1

GIFTS

## The Appreciation Equation



### GIFTS + THANK YOU = STRONG RELATIONSHIPS

Connect with customers in a way that feels personal and relational, not automated or mechanical. Send an unexpected gift of food rather than a computer-generated postcard. Food is central to our human interactions and is a powerful driver of customer loyalty. By saying “Thank You” with a gift of food, you’re expressing your desire for an ongoing relationship and that doing business together is an occasion worth celebrating.

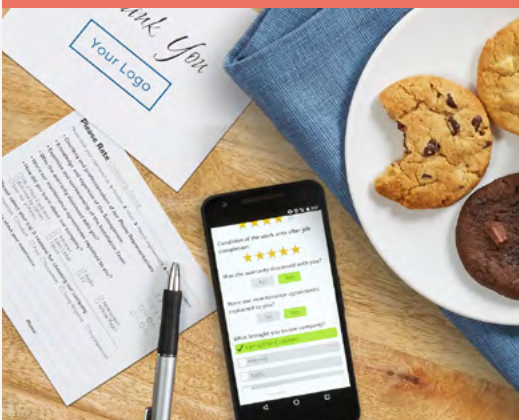
*Positive surprises activate the brain’s pleasure centers and reward system. This helps release your customer’s feel-good chemicals and reinforces the behavior that brought the reward in the first place--doing business with you. And if the gift includes chocolate, there’s an extra shot of those feel-good chemicals on the way.*

Bernie Sweeney is the VP of Sales for Oliver Heating & Cooling, one of the largest multi-trade residential contractors in the nation. They send a treat to customers after the sale. Says Sweeney, “We’re always looking for special ways to differentiate ourselves from our competition and the unexpected Thank You gift does that for us. The fact that we don’t tell the customer a gift is coming is what makes the impact so huge when it arrives. Everyone enjoys surprises, especially when it’s something they can share.”

2

SURVEYS

## Harness the Power of Customer Surveys



Has your company tried surveys as a part of building customer satisfaction? Many home service companies roll out customer surveys only to abandon them due to a poor response rate or lack of an automated system to compile results and create meaningful reports.

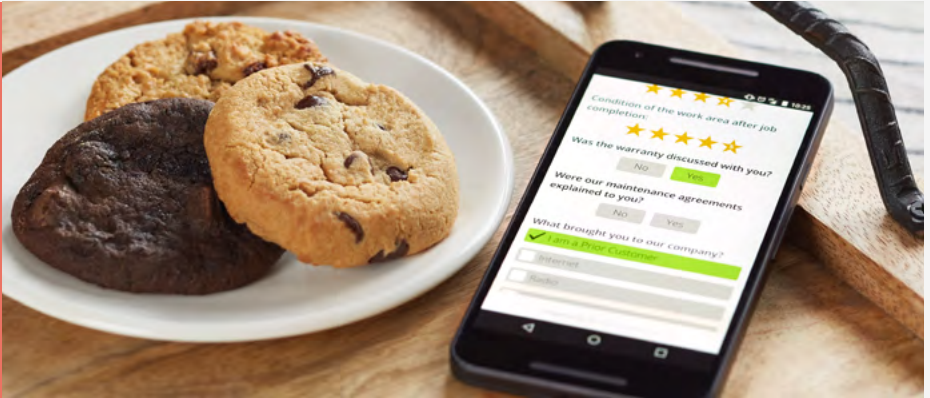
When executed correctly, the responses from surveys can be a powerful tool for improving your service, addressing complaints, and building a positive relationship with customers.

### Get Survey Success

A few of the keys to an effective customer satisfaction survey process:

- ✓ A user-friendly, mobile survey interface
- ✓ Automated reminders
- ✓ Human review of customer comments
- ✓ Robust reporting and leader boards for team members
- ✓ Immediate alerts of negative feedback
- ✓ Notifications of positive feedback to encourage team members

# Why Online Reviews Matter



Did you know your online reputation can directly affect your profits?

***A BrightLocal study found that 88% of consumers trust online reviews as much as recommendations from friends, and they have a major impact on purchase decisions.***

With so much riding on what people say about you online, make sure you provide places for people to leave their reviews. Here are some of the top tips for getting and leveraging online reviews:

- ✓ Make it easy to share good reviews. Some customers, especially older ones, may offer a raving review in a survey but are unsure how to share that on social media. Consider an automated system that flags positive survey responses and sends an email with directions for how to post reviews on various channels.
- ✓ Make sure your main review platforms are up to date with images and your correct business information. This helps with credibility as people are reading the reviews.
- ✓ Respond! Make sure you are responding to reviews as they come in, especially if they provide constructive criticism on the services they received. [According to BrightLocal](#), responding to reviews is more important than ever, with 30% naming this as key when judging local businesses
- ✓ Share your top reviews on your website and social platforms. This is a great way to get those positive reviews in front of potential new customers who are learning more about your services.
- ✓ Create an emotional connection with your brand with unexpected thank-you gifts. When customers feel valued, this generates enthusiasm for the brand, which in turn drives the sentiment and emotion behind the positive online review.

Try searching online for your business name to see which online listings show up first. Focus on the review platforms that are high in the results. Usually, they will be:



With 97% of consumers reading online reviews for local businesses and 92% saying they hesitate to make a purchase if there are no customer reviews posted, helping create an amazing customer experience that promotes online reviews becomes a vital business strategy.

SOURCE *Fan & Fuel Digital Marketing*





## Put Your Customer Retention on Autopilot

If you're like most home service companies, you're wondering how you will have the time and resources needed to analyze and act on survey results, manage online reviews, respond to complaints, and send out memorable gifts and engaging emails.



***You need a proven customer loyalty and retention process that feels personal to your customers while also allowing your staff to focus on providing quality sales and service.***

# The To Your Success Program



## 1. Delight Every Customer

Delicious gifts of hand-crafted food help reward customers and build strong emotional connections with your brand. Each package includes gourmet food, a customized greeting card, postage-paid survey, branded email touchpoint, and delivery. There are also options to include quality, branded travel mugs, coolers, and more.

## 2. Listen to Customer Feedback

Our proprietary survey process makes it easy for customers to respond, and it has four times the response rate of traditional methods. Customer feedback can be segmented by branches, business units, team members, and more.

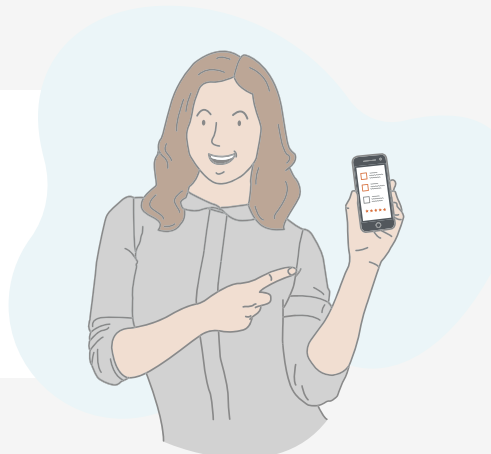


## 3. Understand the Customer Experience

You'll receive real-time reports and up-to-the minute analytics through our cloud-based program. This allows you to make meaningful change and data-driven decisions.

## 4. Showcase Positive Reviews

We help you put positive customer comments in the spotlight with a system that drives five-star reviews on critical sites like Google, Facebook, and others.



# A Track Record of Success

WHAT OUR CUSTOMERS ARE SAYING



"We started using To Your Success in 2000. It's a really easy way to communicate our appreciation to the customer. Folks are not expecting something after you finish the work. So for something to come in the mail unexpectedly is a great impression you've left with the customer. And it helps get a lot of those surveys back to give you good feedback on how you're doing."

## Barry Abernathy

President, E. Smith Heating & Air  
Carrier Dealer Hall of Fame  
To Your Success Customer since 2000



*"The main thing the product does is give us that wow factor. It's not a card or a phone call; it's an actual gift. It's amazing how many clients say 'those cookies were great.' The program is a success where before we were just doing cards. If you want to get that client retention, there's no better way than this."*

## Vince DiFilippo

President, DiFilippo's Service  
NCI Contractor of the Year  
To Your Success Customer since 2004



## SCHEDULE A FREE DEMO

To Your Success helps you build a unique customer loyalty program that's sure to help you stand out from your specific competitors. Start building customer loyalty and boost your bottom line with a free demo of the To Your Success System today.

**SCHEDULE YOUR 30-MINUTE LIVE DEMO TODAY!**