



HOME SERVICES HOW-TO GUIDE

The Ultimate Guide to Saving Time & Money

Spend less time managing your back office and more time doing what you do best.



Home Services Pros Feel The Heat

Roughly two-thirds of small businesses report facing financial challenges. Nearly half say their biggest is operating expenses.¹



Harden Painting, Lexington, KY
Thryv users since 2021

Getting bogged down in administrative tasks does nothing to get you closer to these goals. It's a painful fact for most home services providers that the administrative side of running a business — fielding inquiries, scheduling appointments, invoicing customers and paperwork in general — takes away from the real work you do.

Every provider in the trades is unique. But they all share a critical challenge: How to spend more time performing quality work and less time running the office.

Amid a pandemic, when other businesses struggled to stay afloat, the home services industry was run ragged, growing by a whopping \$62B in 2022. By 2026, experts expect this market to reach \$1.3 trillion in revenue.

Whether it's because people stayed in their homes more, or simply because home will always be the center of our lives, work never seems to stop for electricians, plumbers, pest control companies, locksmiths, landscapers, HVAC technicians, roofers and the like.

Your home services business is as important as a grocery store in terms of "essential work," but with a big difference. People don't just use the nearest and most convenient contractors. They choose the one that does the best job, for the best price.

There's another factor customers care about, too: How easy a contractor is to work with.

How easy is it to make an appointment?

To get an estimate?

To pay a bill?

Customers' expectations have changed considerably over the last few years.

While they may still appreciate personal touches like phone calls, they also value the ease of paying bills online and scheduling their own service calls through your website.

They don't have the patience to wait days for a callback. They're likely to move on to another company if they don't get the answers they're looking for quickly.

It's a lot of pressure. But with the right strategies, setup and systems, businesses in the trades can distinguish themselves and run less costly, more efficient back offices.

Furthermore, customers are increasingly digital-savvy. That's why the most successful home services companies use technology to provide great customer service.

But technology is a tool, not a magic fix. In fact, to excel as a modern trades provider — and to find the money hidden in your business — you need a thoughtful business approach and the right tech tools to support it.



Unicorn Air & Heat, Phoenix, AZ
Thryv users since 2018

7 Business Productivity Tips & Best Practices

TIP 01

Get (and Stay) Organized

You can't run a business efficiently without the right systems in place.

A well-organized business is a productive business. While surely every business owner wants to be organized, it's an easy chore to set aside. After all, a paying job will always be more important than spending hours getting file cabinets in order, as thrilling of a task as that sounds.

Yet, without systems in place, you're never working at your most efficient or productive. You end up spending too many hours searching for lost invoices, returning phone calls from clients who fall between the cracks and correcting mistakes that could have been avoided.

Disorganization also can make you miss opportunities to proactively market your business. In other words, it's money lost.



You will never regret taking the time to set up systems that work for you and your staff, relieving everyone of tasks such as:

- Booking customers
- Scheduling staff
- Confirming appointments
- Conducting consultations
- Issuing estimates
- Invoicing
- Collecting and tracking payments
- Purchasing parts
- Storing project notes
- Managing online marketing and ads
- Following up on all the above

There might be other tasks that regularly frustrate you. Identify them. If you're not sure where to start, the big categories to look at are task management, customer relationship management and document storage.

When you remedy the inefficient parts of your business, and when everyone on your team uses the same tools and does things the same way, it creates a strong business foundation and helps prevent avoidable mistakes.

TIP 02

Set Measurable Goals

Simply saying you want to grow your business isn't enough.

To the busy service professional, taking the time to set goals might seem frivolous — a “nice to have” but definitely not a “this needs to get done today.” Goals are worth setting because they serve a real purpose in small business — actually, several purposes.

- Goals help you decide where you want your business to go. Then, you can hold yourself (and your team) accountable to that vision.
- Conversely, they direct your time away from time-sucking activities that don't help you reach your objectives.
- Once defined, goals motivate, giving you and your team direction.
- Goals also help you make more-informed decisions on hiring, marketing and other strategic imperatives.
- Documented goals help you identify and prioritize how to spend your time as a business owner.



Goals might be financial (a certain amount of revenue a year), growth-oriented (a particular number of new customers or team members by a specific date) or related to reputation (increasing five-star reviews by a certain percentage, or a number of reviews to strive for).

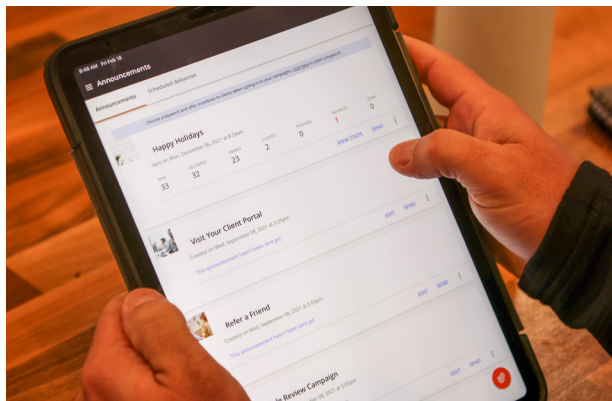
Plenty of studies show that writing down goals is a scientifically valid way to achieve them — but with a hitch. Goal setting is far more effective if the goals you write down are explicit.

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People who very vividly describe or picture their goals are anywhere from 1.2 to 1.4 times more likely to successfully accomplish their goals than people who don't.

— Mark Murphy on Forbes.com

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“Be better at customer service” is a good vision, but not a great goal. “Improve the average customer review star rating” is a good goal. Even better: “Improve the average review star rating by a full point within six months.”

While they should be detailed, goals can be as simple as scribbles on a napkin. But plenty of basic goal-setting systems exist to help you structure your ideas.

One of the most practical and popular approaches to goal setting is the SMART system. SMART stands for specific, measurable, achievable, relevant and time-bound.

Create objectives that have all five of these qualities. For instance:

To raise our reputation and attract new customers, we will obtain and post 50 positive customer reviews on our website within the next six months.

This goal is specific and measurable: 50 positive reviews. It's achievable — especially if you automate customer surveys when closing out each project. It's relevant because it will affect the business in multiple positive ways. And it's time-bound: six months.

Having measurable goals is the first step to measuring, which is the next key tip.

TIP 03

Measure Progress

Track your progress against goals as you go.

Once your goals are in place, make it a practice to regularly track your progress against them. This will help you see what's working and what needs to be improved.

Depending on the goals, you can check progress in different ways. If your goal is to improve revenue, you need systems that track revenue weekly, monthly, quarterly and annually — then you can decide how often to measure. Revenue can fluctuate weekly, so measuring monthly might make more sense. But keep in mind not all months have the same number of workdays.

For most small business owners, goal setting is not a matter of “set it and forget it.” A best practice is to revisit goals periodically — say,

every six months or year — to figure out if they're still the best focus for your business.

Set aside a regular time to check progress in between your semiannual or annual goal reporting. For instance, on the first Monday of every month, you might spend the first hour of your day taking stock of your progress. Block this time in your calendar with a repeating hold so it's non-negotiable.

As things change within your business, industry or even the economy, you might find yourself revising your goals along the way.



TIP
04

Build a Team You Can Delegate to

Then really do it.

As your business grows, you may need to hire additional staff to help with things like accounting, customer service and marketing. Hire people you feel comfortable delegating to — then do the delegating. This can be one of the hardest things for small business owners, who often have the “if you want something done right, you have to do it yourself” mentality.

Regardless of whether that old adage is true, you can’t do everything and stay healthy and sane. You also can’t juggle everything and still grow your business. The right team is one of the strongest assets any home services company can have.

But that’s easier said than done in our current lean hiring market. A recent poll found that for 47% of small business owners, “finding and retaining qualified employees was the most significant problem small businesses faced.”



If staffing is a struggle for your business, here are a few approaches to consider.

- Work on your team's diversity. If you've traditionally hired men of a certain age, or people from a particular population, widen your net. You might be missing out on some solid talent because you're looking for a specific type of hire.
- Consider interns and apprentices. A great way to train new talent and bring more diversity into your business and industry.
- Supplement your permanent staff with consultants, trade subcontractors or suppliers.
- Get creative with technology. Some tech-savvy contractors use livestream video so senior technicians can supervise more junior technicians onsite.
- Partner with other businesses or contractors to mutually increase your workforces and bid on jobs together.



Goodfella's Pest Management, Port St. Lucie, FL
Thryv users since 2016

There also are ways to make your business more attractive to full-time employees, even if you can't compete with corporate salaries. For instance, better benefits — such as flexible work, paid leaves of absence, tuition reimbursement and 401(k) savings match programs — can make a difference to job seekers.

You can also play up the advantages of coming to work for a small, grassroots company. There's typically a lot of room for star talent to grow and thrive in a smaller organization, and greater opportunity to learn directly from the owners.

If you've already built a pretty solid team, the next step is to get them all on the same page. It's never too late to create better systems and start leaning on your people — even if it takes a little training up front.

TIP
05

Take Breaks!

For small businesses, burnout leads directly to money lost.

People are pretty burned out these days. Perhaps you're one of them. Or maybe you're lucky and feel motivated and inspired!

Regardless, taking work breaks is one of the most important things you can do to reach professional success. But it can also be one of the hardest, because it probably sounds counterintuitive to take time away from your business to simply relax.

As a small business, you might feel like every minute spent working leads directly to dollars. But ironically, stepping away for a few minutes, hours or even days can help clear your mind and open channels of creativity. And it's those creative ideas you want. They're the ones that'll help you find unique and faster ways of reaching your goals, and more cost-effective ways of getting there.

For example, fresh thinking could lead you to:



Diversify your services.

You might find a new way to bring in revenue.



Rethink job assignments.

Adjust job descriptions to help you meet current and future needs. Or create new roles that better match available candidate pools.



Open new locations.

Or try franchising. Expand your geographic footprint to capture new market opportunities.



Try new things.

A sure way to kill your business is to say "we've always done it that way." What old problem can you solve in new ways?

New or innovative ideas typically only come when you're relaxed. Use that time to stop actively thinking about work and let inspiration strike. As “woo-woo” as these claims sound, there's actually a lot of solid science to back them up.

- One study found more than 40% of our creative ideas happen during breaks and downtime. Why? Because that's when our minds can wander.
- Skipping lunch regularly is directly related to stress buildup.
- Sleep, specifically, promotes creative problem solving — thus the age-old saying of “let me sleep on it.”



Genco Floorcovering, Hopewell Junction, NY
Thryv users since 2020



When you're rested, you perform your best. You don't have to start napping regularly to see the benefits of taking breaks. Here are some ways you can build R&R into every day:

- Take a walking lunch.
- Turn off your phone for a set amount of time every day.
- Set aside 10-20 minutes a day to read a book, newspaper or magazine article.
- Wear a smartwatch or fitness tracker that reminds you to stand up and walk around periodically.
- Do a web search for “breathing exercises” and practice one daily.
- Buy a white noise machine to drown out office chatter.
- Fill your office space with plants. Studies show indoor plants reduce stress.

You might have other ideas. The point is to find something that works for your schedule and your psyche. Sometimes, just taking a moment or two to stare into space is enough to help reset and refresh your brain.

TIP 06

Automate Everything You Can

Stop doing things a digital tool could do.

You might be surprised how many back-office administrative tasks could happen automatically with the right systems. So, get out of the business of manually running a business. You'll free up your valuable time — and your staff's time — to focus on the expertise that directly generates revenue.

For example, you can automate:

- Invoicing. Save hours each month.
- Overdue account tracking. You don't have to figure out which customers still owe you.
- Appointment reminders. Avoid missed appointments and wasted staff time on a service call that doesn't happen.
- Seasonal email marketing. Remind customers to book their chimney cleaning appointment or their HVAC checkup.

Automation is a common feature of many software systems these days. For instance, most email marketing tools make it easy to set up automatic emails. You may already be automating some tasks, such as sending a "welcome to the business" email to new customers when you enter them into your customer database.

But the more types of software you use, the more work it is to comb through each one looking for automation opportunities. If you can simplify your software stack to an all-in-one platform, it's easier to take advantage of automation.

On a similar note, using templates for paperwork you frequently produce also can save you tons of time. What documents do you use over and over? Proposals? Contracts? Invoices? Follow-up emails on unpaid accounts? Monthly reports? Payroll documents?

If you typically create proposals in Microsoft Word® or another word processing tool, convert them to templates. Setting up some basic templates takes a little time up front, but saves you loads of time down the line.



You don't necessarily have to create your own templates, either. Some software platforms include them. If you are in the market for new software, check out what sort of templates and automation each system provides before you commit.

Using automation and templates doesn't just save you time (and therefore, money). It also ensures your communication with clients is consistent and reliable. When customers always receive estimates that are easily readable and use common language, it creates trust. And when your invoices are clear and mistake-free, you get fewer follow-up calls and questions that you then have to spend time on.

65%

of workers say they find work less stressful when they can automate manual tasks.



Automation is the key to innovating your business and standing out to your customers.

- Automation is one of the most important things you can do to save yourself time and money.
- It's not just a buzzword. It's a powerful capability that can help you re-envision your business processes. You save time and money by making both more efficient and effective.
- Automation means you spend less time on paperwork, make fewer scheduling mistakes and do less fussing with software.
- It ensures your customers always get the communication they need in a timely way, without much effort on your part.
- It helps your marketing messages or promotions reach more potential and repeat customers.
- It guarantees invoices are sent when services are performed — and notes when they're paid.
- Requiring far less manual work, automated processes boost your customer service while easing the administrative work holding you back. Both your employees and customers benefit.



TIP
07

Review Your Rates, Partners & Marketing

3 things you can do right now to find the money hidden in your business.

01 Analyze where money comes in and goes out

Review your pricing structure to find opportunities for more revenue, then take a close look at your expenses for cost-cutting ideas. Are you taking advantage of every possible tax break?

Within your sales process, what seems to close customers? Could you spend more time and energy on those things and less on tasks that rarely lead to sales?

03 Find good partners offline

Join a business association or your local chamber of commerce. Trade shows, conferences and other types of networking events are fantastic opportunities to build connections and meet new customers.

Get involved with community events and charitable causes, which have the side benefit of raising awareness about your business. You might even consider bartering goods or services for advertising space in a local paper or other promotional opportunities with like-minded businesses.

02 Give your digital marketing attention

Finding ways to automate your marketing — or at least make it easy — will have big returns. For instance, consider implementing a referral program that encourages customers to spread the word about your business. Solicit reviews from happy customers while you are fresh on their minds.

Make sure your website is optimized for search engines and designed to turn visitors into customers. If you're not already using social media networks like Facebook, Instagram and YouTube to promote your business, that's another easy marketing opportunity.



TIP
08

Use Cloud-based Software

Invest in software that's always accessible, anywhere.



A decade ago, most companies invested in software that came on a CD and was installed directly onto an office computer. Today, cloud-based software is the standard. Instead of installing software manually, you simply sign up for a subscription online. The software can be accessed through a web browser or an easy-to-download app.

Cloud-based software is generally superior to installed software for a few critical reasons:

Anyone on your team with permission can access and add information no matter where they are — even at a call or in the field — often from a smartphone or tablet.

At the same time, everyone has access to the most up-to-date information.

When a technician on a call can update the customer's record from their phone, folks back at the office can see exactly what was done.

Because cloud-based software is subscription-based, there is no up-front investment (except, perhaps, one-time onboarding training). Instead, you pay a monthly or annual fee according to your use.

Cloud-based software often can grow with your company, so you only pay for what you need — no more, no less.

You don't have to keep an IT specialist or a tech expert on staff or even on call, because cloud-based software is always supported. The best ones offer 24/7 support.

There's another key reason cloud-based software is better for small businesses. With cybercrime increasingly common and regulations constantly changing, keeping your company's crucial files and data in the cloud — hosted by a company that invests heavily in cybersecurity measures — is simply safer.

Cloud-based storage is highly secure, with redundancy built in. This means the software provider has multiple copies of your data and information in their system. If the unlikely were to happen and one of their physical locations is damaged, you wouldn't lose your information.

Good cloud software providers build regulatory compliance into their technology, understanding

which regulations apply to what industries. For instance, if you follow HIPAA regulations, and they change, a "HIPAA-compliant" system will address the change for you. You don't have to worry about doing anything on your end. The software provider takes care of it. With cloud-based software, your information is safe and secure and compliant.

Switching to cloud-based software is a powerful way for small business owners to streamline expenses and tap into the power of modern technology. Additionally, cloud-based software is typically more affordable than traditional on-premises software — typically only a few hundred dollars month — and customer support is usually well-staffed.



Running a business doesn't have to be difficult.

Imagine your life and business with the right people, systems and technology in place.



Green Tech Cleaning, Crestview, FL
Thryv users since 2017

- 01** Your appointments and schedule are tracked in one place. Everyone on your team can see them, even from their phones on a jobsite.
- 02** You're always organized, with prioritized daily task lists and job notes that are easy to create and access.
- 03** Team schedules and assignments are simple to keep track of and easy to find. Updates are instantly available when a client books or cancels, or an employee calls in sick.
- 04** You create and email invoices or estimates with minimal manual work.
- 05** Clients pay faster with online payments — no more waiting for checks in the mail.
- 06** Payment tracking provides an accurate view on the state of your finances.
- 07** You build customer relationships through automatic digital messaging features that cater to each customer's communication preferences.
- 08** You can automatically send marketing emails and communications to your entire customer database at the same time.
- 09** You're tapped into business performance insights and analytics so you can tweak and scale your efforts.
- 10** All the while taking advantage of robust tech support any time you have a question, without having to pay your own IT team.

Take a Chance on Change

Spend less time managing your business and more time doing what you do best — serving people.

Pandemics, climate catastrophes and inflation disasters will come and go. The economy is subject to a lot of factors. But one thing will never change: Your customers want to be comfortable and happy in their homes and businesses.

With its robust features and intuitive interface, Thryv is ideal for small businesses. A cloud-based software platform that integrates with all the digital tools you use, Thryv saves you time and money with:

01

A 24/7 customer support team always available to help you at no cost.

02

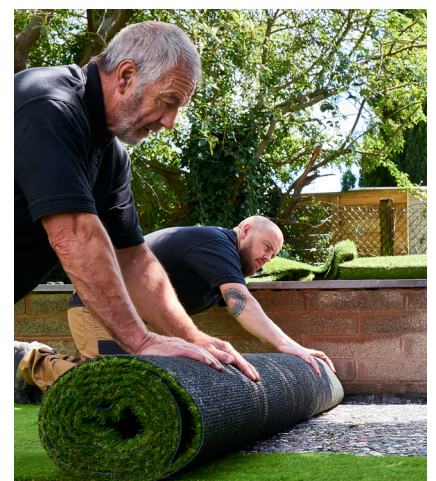
A consolidated, centralized platform to run your business in one place

03

Automatic updates that deliver the latest features and security updates without having to enlist an IT team.

04

Software and systems that grow with your business. And don't break as you get bigger.



Why Wait to Automate?

Get a free demo of Thryv to see how it could transform your business.

You'll be happier, your staff will be happier and most of all, your customers will be happier.

Contact Us



Client Adored, Industry Recognized

What Thryv users are saying.



25%

increase in average
number of customers

“

Thryv optimized the way we do business. Customers are happier and my ROI is through the roof!

~**Brad Bassham**

Good Guys Window & Glass Repair

”

“

Thryv makes it easy to see overall health of the company. While Thryv's calendar keeps all my appointments organized and helps me manage my day.

~**Mike Tambs**

Unicorn Air & Heat

”

61%

increase in number of
appointments booked

86%

annual revenue increase
through bookings
and payments

“

I love ThryvPay because everything is right there. I can see my deposits and payments all in one place. I will definitely continue to use Thryv.

~**Linda Moss**

Goodfella's Pest Management

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Thryv provides a secure, easy-to-use platform that automates tasks and allows clients to put their customers at the center of their business.

Our software offers Customer Relationship Management (CRM), Search Engine Optimization, Marketing, online invoices & receipts, text messaging, email marketing, print and social media management. This automation provides the edge local businesses need to better succeed in their market.

We do it all in a convenient client experience management app that allows small business owners to get the job, manage the job and get credit all from the palm of their hand.

Discover how Thryv can assist you in managing your business more effectively and efficiently. Visit www.thryv.com today!

