THE QUIET PROTOCOL
AI SYSTEMS & AUTOMATION

# Home Service Speed-to-Lead Checklist

A free speed-to-lead checklist for home-service businesses that want to tighten response time across calls, web forms, chat, and text.

HVAC, plumbing, pest control, roofing, and general home-service teams

## GUIDE

A homeowner calls while your crew is on a job. Someone writes down the number, but nobody knows who will call back. By the time the office finds the note, the homeowner has booked another company. A faster greeting would not have fixed that handoff.

Use these 15 checks to follow an enquiry from first contact to its next useful step. They work for HVAC, plumbing, electrical, roofing, restoration, garage-door and other field-service teams. You can complete the review with a phone log, a shared inbox and a calendar. You do not need to buy software first.

## OWNER CHECKLIST: HOW TO SCORE THE 15 CHECKS

Choose one service line and one recent working week. Examine the actual call records, form receipts and appointments. Include missed enquiries and after-hours requests, not only booked jobs. Keep customer details in your own records; this worksheet does not need their names or addresses.

For each check, write a score and a record that supports it:

- 0: the step failed, has no owner or cannot be verified.
- 1: it worked sometimes, but the rule or handoff was inconsistent.
- 2: it worked in the reviewed records and the team can explain who owns it.
- N/A: it does not apply to this service line. Record why and exclude it from the available points.

There are 15 scored checks, so the maximum is 30 when all apply. With an N/A item, subtract two from the maximum. This is a working checklist, not a validated benchmark or an estimate of lost revenue. Compare the same checks and service line next time. A higher total does not excuse an unresolved urgent-call handoff.

## CALL HANDLING: CHECKS C1 TO C5

- C1. Answer or recover. During your stated answering hours, calls reach the agreed person or service. A missed call has a named callback owner. Score: __. Evidence: __.
- C2. Record the request. The receiving record includes the caller's contact method, service needed, location, time received and what they were told. Score: __. Evidence: __.
- C3. Separate urgency. Your approved urgent-call rule identifies the receiving person and fallback. The person answering does not promise a crew or invent technical advice. Score: __. Evidence: __.
- C4. Cover after hours honestly. Callers know whether you are arranging a callback, offering an available appointment or contacting on-call staff. Score: __. Evidence: __.
- C5. Confirm the handoff. If the first recipient does not accept the request, the agreed fallback takes over and the unresolved item remains visible. Score: __. Evidence: __.

## WEBSITE AND MESSAGES: CHECKS W1 TO W5

- W1. Find the right action. On a phone, a visitor can identify your service area and reach the call or enquiry action without hunting through menus. Score: __. Evidence: __.
- W2. Ask useful questions. The form collects only what your team needs to choose a next step. Optional details do not prevent someone from asking for help. Score: __. Evidence: __.
- W3. Confirm receipt accurately. The confirmation explains that the request was received, the response window you can support and any approved urgent alternative. Score: __. Evidence: __.
- W4. Reach a monitored destination. A test enquiry appears in the inbox or record your team actually checks, with a responsible person. Score: __. Evidence: __.
- W5. Keep the request together. A follow-up text, call or form can be associated with the original enquiry so the customer does not have to start again. Score: __. Evidence: __.

## OFFICE HANDOFF: CHECKS H1 TO H5

- H1. Name the owner. Each open enquiry has one person responsible for its next action, including lunch, leave and shift changes. Score: __. Evidence: __.
- H2. Keep the promise visible. The next person can see what the customer was told, including a callback time or a pending availability check. Score: __. Evidence: __.
- H3. Distinguish the next step. Records separate an enquiry, an estimate request, a confirmed appointment and a dispatch decision. Score: __. Evidence: __.
- H4. Schedule agreed follow-up. When a customer wants a later callback, the record names who will make it and when. Declined contact and duplicate requests are handled correctly. Score: __. Evidence: __.

- H5. Close the loop. The team records the outcome and can find requests still waiting for a response at the end of the shift. Score: __. Evidence: __.

## WORKED SCORING EXAMPLE

Suppose all 15 checks apply. Four score zero, five score one and six score two. The total is (4 x 0) + (5 x 1) + (6 x 2) = 17 out of 30. This is an illustration, not a client result.

If C5 is zero because nobody accepts urgent handoffs, fix that before a cosmetic improvement to W1. If one check genuinely does not apply, assess the remaining 14 against a maximum of 28. Do not compare that raw total with a week that used all 15 checks without noting the different denominator.

## COPY/PASTE SCRIPTS

Request received: Thanks for contacting [Business]. We have your request about [service]. [Team/person] will [next action] within [approved response window]. This message confirms receipt; an appointment or crew arrival will be confirmed separately.

Missing details: To get this to the right person, what service do you need, where is the job and how should we reach you? Please do not send payment details in this message.

Internal handoff: Received [time] through [channel]. Service: [need]. Location checked: [yes/no]. Customer was told: [promise]. Next owner: [person]. Next action due: [time]. Acceptance: [pending/accepted].

Replace every bracket before use. A response window is an operational promise, not an industry number to copy. Test it against your opening hours, staffing and on-call coverage.

## DECISION AND HANDOFF WORKSHEET

For the most important failed check, record:

- Where the enquiry stopped: [Channel and failed step].
- What the record shows: [Timestamp or internal reference, without public personal details].
- Who takes the next action: [Named role, plus cover when absent].
- What the customer will hear: [Approved wording and a realistic response window].
- What happens if nobody accepts: [Fallback recipient and escalation rule].
- How you will test it: [A normal request, an after-hours request and an unavailable recipient].

A notification being sent is not evidence that the next person accepted it. During the test, check the receiving record and acknowledgement as well as the customer's message.

## 7-DAY IMPLEMENTATION SEQUENCE

1. Review the selected week's records and score the 15 checks.
2. Choose the failed handoff with the greatest practical consequence. Name its owner and cover.
3. Rewrite the customer message and internal handoff so the next step is explicit.
4. Test a normal enquiry, an after-hours request and a missing-detail request with your own team.
5. Test the fallback when the normal recipient is unavailable. Correct any false appointment or arrival promise.
6. Review new records for the same service line. Identify requests still waiting, not only successful bookings.
7. Repeat the applicable checks. Keep the working manual process; add automation only where a stable rule still needs help being followed.

## METRIC TRACKER

Record the period, channel and number of enquiries reviewed. Track time to the first useful response separately from an automatic receipt message. Record the typical response and the slowest unresolved request, rather than hiding a long wait inside an average.

Also count requests without an owner, handoffs accepted by the next person and appointments actually confirmed. Qualified bookings divided by eligible enquiries can help you assess the journey; document what you mean by eligible. These are your operating measurements, not promised improvements from TQP.

## KEEP REVIEW INVITATIONS SEPARATE FROM SERVICE RECOVERY

Use an objective customer milestone and the same neutral invitation for every eligible customer. Do not select recipients by satisfaction, offer incentives or ask for a particular rating. A complaint can reach support without removing the public review option. See the review request pack (https://www.thequietprotocol.com/resources/free-tools/google-review-request-pack) for ready-to-edit messages and checks.

## PUT THE WORKING PROCESS INTO A SYSTEM

The Quiet Protocol configures home-service call answering and handoffs (https://www.thequietprotocol.com/industries/home-field-services#home-service-answering) around your approved service rules. Bring the failed check, receiving destination and test cases to a free consultation (https://www.thequietprotocol.com/book/intro?intent=home-service-response). We can work out whether you need a clearer manual process, a website correction, AI answering or a connected intake workflow before scoping the work.