TRADES REVENUE
DIAGNOSTICS

A 6-Phase Framework To See Your Entire Customer Experience At a Glance

HOME SERVICES
CUSTOMER JOURNEY MAP

See Where You're Building Trust, Where You're Leaking Money,
and How To Turn Jobs Into Reviews and Referrals

SCAN ME

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Created by Jeff Secrease
www.TradesRevenueDiagnostics.com

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TRADES REVENUE DIAGNOSTICS

HOME SERVICES CUSTOMER JOURNEY MAP

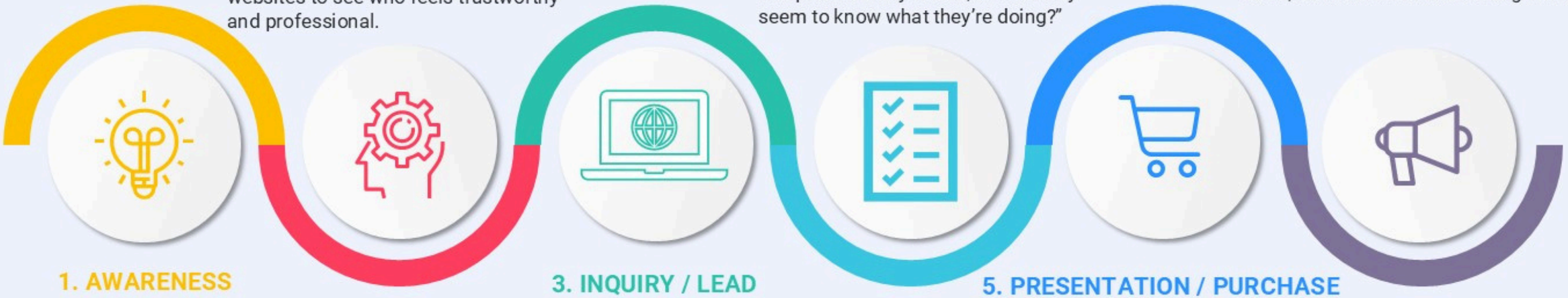
A Visual Overview of the Full Customer Experience – From Awareness to Advocacy

1. AWARENESS

What customers are doing:
Noticing a problem for the first time: AC not cooling, stains on the ceiling, peeling paint, foggy windows, strange noises from equipment. They feel annoyed, a little stressed, and start wondering, "How bad is this, and what is this going to cost me?"

2. CONSIDERATION

What customers are doing:
Admitting they need help and checking their options: Googling local providers, reading reviews, asking in Facebook groups, talking to friends and neighbors, and clicking around websites to see who feels trustworthy and professional.



3. INQUIRY / LEAD

What customers are doing:
Reaching out to a few chosen companies: calling, filling out a form, sending a DM, or walking in. They expect a fast, friendly response and a simple way to get on the schedule. Whoever answers quickly and clearly usually wins this stage.

4. APPOINTMENT / ASSESSMENT

What customers are doing:
Meeting you in person: waiting for the tech or estimator to arrive, watching how they behave in the home, and listening to how the problem is explained. They're deciding, "Do I trust this person in my house, and do they seem to know what they're doing?"

5. PRESENTATION / PURCHASE

What customers are doing:
Hearing options and prices at the kitchen table: comparing Good / Better / Best choices, asking questions, weighing risk, and deciding whether to move forward now, get more quotes, or delay. Clear, simple options and payment choices make it easy to say "yes."

6. FULFILLMENT / ADVOCACY

What customers are doing:
Living with the result and deciding what to say about you: noticing if the work was done right, if the home was respected and cleaned up, and how you follow up afterward. Happy customers leave reviews, remember your name, and refer friends and neighbors.

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TRADES REVENUE DIAGNOSTICS

HOME SERVICES CUSTOMER JOURNEY MAP

Know Your Customers

1. AWARENESS
"Something's Wrong"

Customer Behavior / Action

- Notices a problem (AC not cooling, stain on ceiling, peeling paint, foggy windows, strange noises, pests, etc.)
- Tries a quick DIY fix or ignores it for a bit
- Googles symptoms ("AC not blowing cold," "brown spot on ceiling")
- Mentions it to a spouse, neighbor, or friend
- Starts paying more attention when the problem gets worse or shows up again

Thoughts & Emotions

- Annoyed or stressed
- Worried about: "How bad is this?" and "How much is this going to cost?"
- Unsure if it's urgent or can wait
- Hopes it's a simple, affordable fix

2. CONSIDERATION
"Who Should I Call?"

Customer Behavior / Action

- Searches "AC repair near me," "plumber [city]," "roof leak repair," etc.
- Checks Google Maps listings, star ratings, and reviews
- Clicks into a few websites to see services, photos, and guarantees
- Asks in local Facebook / community groups for recommendations
- Asks friends, family, or neighbors who they've used before
- Narrows list down to 2–3 companies that *seem* trustworthy

Thoughts & Emotions

- Cautious and skeptical (doesn't want to be ripped off)
- Comparing professionalism and trust, not just price
- Looking for signs of "real" vs "fly-by-night" companies
- Wants the problem handled with minimal hassle and disruption

3. INQUIRY / LEAD
" Reach Out"

Customer Behavior / Action

- Calls one or more companies from Google or referrals
- Fills out a web form or request-a-quote form
- Sends a DM/text or uses website chat, if available
- Leaves a voicemail if nobody answers
- Books an appointment with whoever responds first and sounds competent

Thoughts & Emotions

- Impatient: just wants someone to take ownership and give next steps
- Relieved when a real person answers quickly and sounds organized
- Frustrated or doubtful when calls go to voicemail or forms don't get a fast response
- Often chooses the first company that makes it easy to book

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TRADES REVENUE DIAGNOSTICS

HOME SERVICES CUSTOMER JOURNEY MAP

Know Your Customers

4. APPOINTMENT / ASSESSMENT

" Come Look at This"

Customer Behavior / Action

- Waits for the tech/estimator to arrive; notices if they're on time
- Watches how they park, introduce themselves, and treat the home
- Points out the issue and answers diagnostic questions
- Listens to explanations of what's going on and possible solutions
- Judges professionalism based on appearance, communication, and care (booties, cleanup, etc.)

Thoughts & Emotions

- Evaluating: "Do I trust this person in my home?"
- Sensitive about safety, cleanliness, and respect for their space
- Nervous about being upsold or overcharged
- Either becoming more confident… or quietly deciding to call someone else

5. PRESENTATION / PURCHASE

"Decision Time"

Customer Behavior / Action

- Sits down (or stays on the phone) to review findings and pricing
- Receives a quote: sometimes one big number, sometimes clear Good / Better / Best options
- Asks about price, timing, warranties, and payment options
- Compares you (formally or mentally) to other quotes they've seen or expect to get
- Decides to move forward now, delay, or get more bids

Thoughts & Emotions

- Worried about making an expensive mistake
- Overwhelmed if the quote is confusing, full of jargon, or has too many options
- Feels relieved and confident when options are simple and clearly explained
- Looking for reassurance that the risk is low and the result will be worth it

6. FULFILLMENT & ADVOCACY

"Remember, Review, Refer"

Customer Behavior / Action

- Experiences the work during and after the job (noise, mess, crew behavior, final result)
- Notices whether the team protects the home and cleans up properly
- Sees if issues are fixed the first time or if callbacks are needed
- Receives or ignores follow-up (thank-you, review request, check-in)
- Decides whether to:
  - Leave a review
  - Recommend you to friends / online groups
  - Call you again for future work or look elsewhere

Thoughts & Emotions

- Relief when the problem's fixed
- Gratitude when they feel well cared for
- Annoyance or regret if communication is poor or there are surprises
- Either eager to say "call these guys" or quietly warn others away

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TRADES REVENUE DIAGNOSTICS

HOME SERVICES CUSTOMER JOURNEY MAP

Touchpoints and Actions

1. AWARENESS
Problem Noticed

Customer Touchpoints
- Advertisements
- Google search / Maps
- Yard signs and trucks
- Mailers / door hangers
- Social posts, local groups
- Neighborhood word-of-mouth

Needs & Expectations
- Simple explanation of common problems
- Proof you serve their area
- Professional, trustworthy first impression

Recommended Actions
- Keep Google profile accurate with fresh photos
- Use branded trucks and yard signs consistently
- Publish short “problem / fix” posts or videos
- Ask happy customers for reviews

2. CONSIDERATION
Options Compared

Customer Touchpoints
- Website / landing pages
- Google Business Profile
- Online reviews
- Social profiles
- Referrals from friends / neighbors

Needs & Expectations
- Clear services and service area
- Proof: **before/afters**, testimonials, ratings
- Simple process and price ranges
- Obvious next step to contact you

Recommended Actions
- Add “Who we serve” and areas to site & Google Business Profile
- Show 3–5 strong before/after photos
- Add FAQs on process, timing, and pricing ranges
- Put phone + “Request a visit” button everywhere

3. INQUIRY / LEAD
Contact Made

Customer Touchpoints
- Phone calls
- Web forms / email
- Text / DM / chat
- Walk-ins / showroom visits

Needs & Expectations
- Fast response from a real person
- Clear, friendly booking process
- Simple questions, not an interrogation
- Confidence they picked a real, active company

Recommended Actions
- Answer calls live during business hours
- Respond to web / text leads within minutes
- Use a short booking script and checklist
- Send confirmation + reminder for every appointment

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HOME SERVICES CUSTOMER JOURNEY MAP

Touchpoints and Actions

4. APPOINTMENT / ASSESSMENT

Visit Booked

Customer Touchpoints

- "On the way" call or text
- Tech / estimator arrival at the door
- In-home assessment and explanation
- Protection and cleanup of work area

Needs & Expectations

- On-time arrival and a heads-up
- Respect for home and belongings
- Clear, non-jargon explanation
- Feeling safe, heard, and not rushed

Recommended Actions

- Train techs on greeting and "serve the home" language
- Provide booties, mats, and a cleanup checklist
- Have techs restate the problem in plain English
- Spot-check jobs by walking them like a customer

5. PRESENTATION / PURCHASE

Quote Delivered

Customer Touchpoints

- Written quote / proposal
- Good-Better-Best options sheet
- Financing / payment details
- Follow-up email or text on open quotes

Needs & Expectations

- 2–3 simple options, not a wall of numbers
- Clear what's included and excluded
- Short, clear warranty or guarantee
- Payment options for bigger jobs

Recommended Actions

- Use a Good-Better-Best template every time
- Add a simple "scope / what's included" section
- Explain guarantees in 1–2 plain-English lines
- Schedule follow-up on all open quotes

6. FULFILLMENT & ADVOCACY

Experience Delivered

Customer Touchpoints

- On-site crew during the job
- Final walkthrough / sign-off
- Thank-you email or text
- Review and referral requests
- Occasional maintenance / reminder messages

Needs & Expectations

- Job done right the first time
- Home left clean and respected
- Easy way to review and contact you again
- Feel appreciated, not forgotten

Recommended Actions

- Do a final walkthrough and confirm everything works
- Send "Thank you + review link" within 24 hours
- Save customer info for future follow-up
- Check in later and ask for referrals when they're happy

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TURN THIS MAP INTO MORE PROFIT IN 90 DAYS

This map isn't homework. It's a tool to help you see your whole customer experience on one page so you can stop guessing and fix what actually matters.

Use it to have better conversations with your team, plug the biggest leaks, and make every lead, visit, and quote more valuable.

Step 1: Circle Your Weakest Phase

Look at the six phases and be brutally honest:

- Awareness
- Consideration
- Inquiry / Lead
- Appointment / Assessment
- Presentation / Purchase
- Fulfillment & Advocacy

Which one feels the messiest or most neglected in your business right now? That's your starting point.

Step 2: Take the Profit Power Quiz (2 Minutes)

Next, run your business through the Profit Power Quiz.
It scores the four money stages inside your journey:

- Leads
- Appointments
- Presentations
- Sales

In about 2 minutes you'll see:

- Which stage is your biggest leak
- Where you're stronger than you thought
- What to focus on in the next 90 days

Link: https://tradesrevenuediagnostics.scoreapp.com/
(Or scan the QR code if you're looking at this on paper.)

Step 3: Pick 1–2 Moves for the Next 30–90 Days

Combine what the map tells you (weakest phase) with what the quiz tells you (weakest LAPS stage).
Then pick 1–2 concrete actions to implement, for example:

- If Inquiry / Lead is weak → improve answer rate and speed-to-lead.
- If Appointment / Assessment is weak → tighten arrival, communication, and in-home behavior.
- If Presentation / Purchase is weak → simplify quotes with Good / Better / Best and clear guarantees.
- If Fulfillment & Advocacy is weak → add a thank-you, review request, and check-in.

Work those 1–2 moves hard for 30–90 days before you add more.

Want Help Turning This Into a 90-Day Plan?

If you'd rather not figure this out alone, that's what I do.
On a free 30–45 minute Profit Power Consultation, we will:

- Walk through your Customer Journey Map together
- Review your Profit Power Scorecard (quiz results)
- Pick the 3–5 highest-impact moves for the next 90 days
- Prioritize what to fix first so you don't waste time on the wrong problems

No hard pitch. If it's a fit, great. If not, you still leave with a clear plan you can execute on your own.

To book a call:
Visit: www.TradesRevenueDiagnostics.com (or scan the QR code)

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