Keep the relationship going

A repeat-business and referral checklist

1. Check the outcome after the job

Choose a suitable time after the work is complete. Ask: "Hi [name], how is everything working since our visit? Is there anything we still need to address?" Resolve concerns before asking for more business.

2. Agree on the next useful reminder

When another service or maintenance visit is relevant, explain why and ask whether a reminder would help. Record what the customer agreed to, the timing, and their preferred contact method.

3. Reconnect with a reason

Contact a past customer when there is a useful reason, not simply because they are on a list. Example: "Last time we spoke, you mentioned [need]. Is that still something you would like help with?" Only reference details you actually know.

4. Make referrals easy and comfortable

After a customer expresses satisfaction: "If someone you know needs help with [service], I would appreciate you passing along our details." Give them an easy-to-forward contact link. Let the referred person choose whether to reach out.

5. Give the process an owner

Record the completed job, customer feedback, agreed next contact, and person responsible. Review repeat bookings and referred inquiries monthly. Honor contact preferences and stop when asked.

CUSTOMER / JOB: _____

NEXT USEFUL CONTACT: _____

OWNER / REVIEW DATE: _____

The goal is to remain useful after the sale. Ask for the next step when it fits the customer, not just your calendar.