



**HUNLEY**

# **SALESFORCE AE / SE PLAYBOOK**

## **HOME SERVICES**

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# A Quick Overview: Understanding This Industry

Home services companies provide installation, maintenance, repair, and improvement services to residential properties. Common segments include HVAC, plumbing, electrical, roofing, pest control, landscaping, remodeling, and specialty trades.

These businesses typically operate truck-and-technician service models where technicians travel to customer homes to diagnose, repair, or install systems.

## What drives performance

- If you're not first...you're last: customers say the first to answer has a 70% win rate
- Speed-to-lead and booking rate: how quickly inbound calls and web leads convert to scheduled jobs.
- Close rate on estimates: conversion of consultations into completed jobs.
- Average ticket size: revenue generated per service call or project.
- Technician productivity: jobs completed per technician per day.
- Revenue per technician: a primary productivity metric in service businesses.
- Customer lifetime value: recurring service relationships and membership programs.

## Common operating model variants

- Service-driven operators: high volume repair and maintenance work.
- Replacement-driven businesses: HVAC systems, roofing, and remodeling projects.
- Membership-driven operators: pest control, lawn care, HVAC maintenance plans.
- Multi-trade platforms: companies expanding across multiple service categories.

# Overarching Market Themes

## Major market trends affecting home services companies

- Private equity consolidation: PE firms are rapidly rolling up regional operators into multi-location platforms.
- Recurring revenue models: membership plans and maintenance subscriptions are becoming standard.
- Lead generation competition: companies invest heavily in Google Local Services Ads, PPC, SEO, and referrals.
- Labor shortages: technician scarcity requires maximizing productivity of the existing workforce.
- Revenue leakage: missed calls, slow follow-up, and unsold estimates lead to lost revenue.
- Rising customer expectations: homeowners expect digital scheduling, SMS communication, and real-time updates.

## Technology implications

- Platforms that unify marketing, sales, dispatch, multiple companies, and service operations.
- Cross-branch reporting for multi-location businesses.
- Lifecycle marketing automation and customer engagement tools.
- Analytics for technician productivity and marketing ROI.

# Key Personas to Engage

## CEO / President

- Often built the business themselves, very to the point. Will sit through about 3 slides.
- Owns revenue growth, expansion strategy, and overall operational performance.
- Typically the economic buyer for major platform investments.

## COO / VP Operations

- Tends to be the calmer right hand to the CEO.
- Owns dispatch, technician productivity, and field service operations.
- Focused on efficiency, technician utilization, and job completion rates.

## VP Sales / Sales Director

- Cares deeply about the productivity of their team. “Will this slow my guys down” is a common quote
- Owns replacement sales pipelines and estimate close rates.
- Often becomes the internal champion for CRM improvements.

## VP Marketing / Marketing Director

- Tends to be B2C oriented, often very socially driven
- Responsible for lead generation, campaign performance, and marketing ROI.
- Often frustrated by lack of attribution and disconnected marketing systems.

## Customer Experience / Call Center Manager

- Responsible for inbound call handling, appointment booking, and speed-to-lead.

## CFO / Finance

- Focused on profitability, EBITDA performance, and investor reporting.

# Account Targeting

## Why target home services?

- Recession proof - if you're roof is leaking, there's a racoon in your attic, or your heat is broken you don't have a choice these people have money and good margins
- Hiring is hard - aging workforce, plus high turnover and for industries like pest control a pretty steep learning curve means AI is more important than ever
- Not technically oriented - these guys will not try and vibe code a CRM, or just make it work with 14 disconnected systems linked with zapier. They want ready made robust systems
- Big deals - very common to have to purchase multiple clouds over time or license the full company

## Ideal customer profile signals

- Multi-location service operations
- Private equity ownership or rapid expansion
- High marketing spend with unclear attribution
- High inbound lead volume
- Disconnected systems across marketing, operations, and finance
- Manual reporting and spreadsheet-heavy processes

## Segments to consider

1. HVAC contractors
2. Plumbing companies
3. Electrical service providers
4. Roofing contractors
5. Pest control operators
6. Landscaping and lawn service companies
7. Remodeling contractors
8. Multi-trade service platforms

## SIC Targeting within Org62

Pull your lists based on the following SIC codes:

- General prefixes: 07 – Lawn & Garden Services, 17 – Construction contractors, 73 – Pest Control, Building Cleaning & Maintenance
- - 0782 - Lawn & Garden Services

- 1711 - Mechanical Contractors (Commercial/Industrial)
- 1721 - Painting & Paper Hanging
- 1731 - Electrical Work
- 1741 - Masonry & Stone Setting
- 1751 - Carpentry Work
- 1752 - Floor Laying & Floor Work
- 1761 - Roofing, Siding & Sheet Metal
- 1771 - Concrete Work
- 1799 - Special Trade Contractors, NEC
- 7342 - Pest Control Services
- 7349 - Building Cleaning & Maintenance

# Make a Strong Pitch: Messaging, with ROI Examples

## Messaging themes that resonate

- Convert more inbound leads into booked appointments.
- Increase estimate close rates through structured sales processes.
- Improve technician productivity and revenue per technician.
- Standardize operations across multiple branches.
- Deliver a unified customer lifecycle platform.

## ROI examples

- Close rate improvement: Increasing close rate from 35% to 45% on 2,000 annual estimates with a \$10K average ticket can generate more than \$2M in additional revenue.
- Technician productivity: Increasing jobs per technician per day significantly expands revenue capacity.
- Marketing efficiency: Closed-loop attribution reduces spend on underperforming channels.
- Membership growth: Automated renewals and lifecycle marketing increase recurring revenue.

# Discovery Questions to Ask

## Growth and strategy

- What percentage of the business is commercial vs. residential or large jobs vs. small jobs?
- What are your revenue goals over the next 2–3 years?
- Are you planning acquisitions or expansion into new locations?

## Marketing and lead generation

- What is your cost per booked appointment by marketing channel?
- How quickly does your team respond to inbound leads?

## Call center operations

- What is your inbound call booking rate?
- How do you track missed calls or abandoned leads?

## Sales and estimates

- What is your close rate on estimates?
- How do you track unsold estimates or follow-up activity?

## Field operations

- How many jobs per technician per day do you average?
- How do you optimize dispatch and routing?

## Customer lifecycle

- What percentage of customers are on maintenance plans?
- What is your renewal rate?

# Common Processes to Streamline

## Major functional areas

- Marketing and lead generation
- Call center appointment booking
- Sales consultation and estimate management
- Dispatch and technician scheduling
- Work order execution and job completion
- Membership management and renewals
- Finance, forecasting, and executive reporting

## Typical lifecycle stages

Marketing → Booking → Estimate → Service Delivery → Membership → Repeat Service

## High-value automations

- Automated lead routing and speed-to-lead workflows
- Appointment scheduling and reminders
- Automated quote follow-up sequences
- Dispatch optimization and technician routing
- Membership renewal automation
- Executive dashboards for operational performance

# Typical Tech Stacks in the Industry

## Industry field service platforms (and key competitors)

- Countless point solutions...
- ServiceTitan
- Housecall Pro
- Jobber
- FieldEdge
- Service Fusion

## CRM & Marketing tools

- HubSpot
- Zoho
- Mailchimp
- Call tracking platforms

## Accounting systems

- QuickBooks
- Sage
- NetSuite

## Typical stack example

Either an end to end point solution, or ServiceTitan for operations, HubSpot for marketing automation, QuickBooks for accounting, and spreadsheets for reporting.

# Salesforce Products, by Likely Fit

## Field Service

- Technician scheduling, route optimization, and mobile workforce management.

## Sales Cloud

- Pipeline management for estimates and replacement opportunities.

## Service Cloud

- Customer service case management and communication workflows.

## Marketing Cloud

- Lifecycle marketing automation and campaign attribution.

## Experience Cloud

- Customer portals for service history, scheduling, and membership management.

## Data Cloud / Analytics

- Executive dashboards and operational analytics.

## MuleSoft / Integration

- Integration with field service platforms, accounting systems, and marketing tools.