TradesProCRM

SOFTWARE AND EBOOK-BASED EDUCATION.

THE PLUMBING BUSINESS PLAYBOOK

7 COSTLY CUSTOMER RELATIONS MISTAKES

PLUMBING COMPANIES MAKE

Practical fixes for missed inquiries, forgotten estimates, and everyday office headaches.

7 practical fixes | A business checkup
Plus a seven-day plan you can put to work.

START HERE

Good work deserves good follow-through.

Customer relationship management coaching for plumbing businesses.

WHY WE PROVIDE FREE RESOURCES

TradesProCRM provides free customer relationship coaching through software and eBook-based education. Our practical resources help plumbers improve selling, customer service, and follow-through. This guide is yours to use, with no purchase required.

CRM is more than a program: it is how you handle relationships from the first inquiry through the completed job and the next service call. Our coaching focuses on those everyday routines; software can give them a place to live.

Start with one weak point. Give each open inquiry, estimate, and job a status, a responsible person, and a next action. Use the checkup on page 10 and the seven-day plan on page 11.

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The examples and suggested routines are illustrative, not industry benchmarks or promises of results. Adapt them to your business, customer preferences, and actual service commitments.

MISTAKE 01 / MISSED INQUIRIES

Letting new inquiries slip away

The next job needs a next action.

You are under a sink when the phone rings. Later, a voicemail, a website inquiry, and a message from yesterday are waiting in different places. None has a clear owner. The problem is easy to miss because a lost inquiry rarely sends a complaint.

Make every inquiry visible, even when you cannot take the job. Record who called, what they need, the service area, when they contacted you, and the next promised action. Being organized also means saying promptly when you cannot help.

A BETTER ROUTINE

1. Choose one capture point. A shared tracker is enough to begin. Put calls, web inquiries, and email requests on the same list.

2. Assign responsibility. Give each open inquiry an owner and a realistic callback deadline during your stated business hours.

3. Close the loop. Mark it booked, declined, outside your area, or awaiting a reply. Do not leave a blank status.

WORDS YOU CAN ADAPT

Hi [Name], this is [Your Name] with [Company]. I am returning your inquiry about [issue]. Are you still looking for help? Our next step would be [call / assessment / appointment].

DO THIS TODAY

Create a single inquiry list. Check your voicemail, email, and website inbox and add every unresolved request.

TRACK THIS

Open inquiries without an owner or next action. Aim to have none at the end of each business day.

MISTAKE 02 / ESTIMATE FOLLOW-UP

Sending estimates and hoping

An estimate is the start of a decision.

You visit the property, work out the scope, and send a quote. Then a busy week takes over. The homeowner may have a question, a timing problem, or another decision-maker to consult. Silence does not tell you which.

At the estimate stage, agree on when you will check back. A simple, courteous follow-up can clarify the decision without pressuring the customer. Record the result so the next person in your office knows what happened.

A BETTER ROUTINE

1. Confirm delivery. Make sure the customer received the estimate and understands the scope, exclusions, and proposed next step.

2. Set a sensible cadence. For non-urgent work, consider a check-in after two business days and another about a week later. Adjust to the customer's preference.

3. Record a real outcome. Won, lost, postponed, or no response. Stop when asked and respect the quote's actual validity period.

WORDS YOU CAN ADAPT

Hi [Name], checking that you received our estimate for [job]. Is there anything in the scope or timing you would like us to clarify? If you have already made a decision, just let me know and I will update our records.

DO THIS TODAY

Review five open estimates. Give each one a status, a next action, and a follow-up date.

TRACK THIS

Open estimate value and estimates with a scheduled next action. Open quotes are potential work, not booked revenue.

MISTAKE 03 / HONEST REVIEW REQUESTS

Leaving reviews to chance

Make honest feedback easy to leave.

A completed job is a natural moment to invite feedback. Without a routine, review requests tend to happen only when somebody remembers. A customer who meant to leave a review may simply never get the link.

Make the same neutral invitation part of your normal completion process for customers, regardless of the rating you expect. Keep the request short, optional, and easy to act on. Help with service concerns without tying that help to a review.

A BETTER ROUTINE

1. Save the direct link. Use the review link from your business profile and test it on a phone.

2. Ask for an honest account. Put a neutral request in the completion email or on the invoice. Let the customer choose whether and what to write.

3. Keep it fair. Do not offer rewards, request a particular rating, or filter public review invitations through a satisfaction survey.

WORDS YOU CAN ADAPT

Thank you for choosing [Company]. If you would like to share your experience, you can leave an honest review here: [review link]. We appreciate your feedback.

DO THIS TODAY

Add one consistent review invitation to your job-completion checklist and test the link.

TRACK THIS

Completed jobs offered the standard review invitation, and new genuine reviews. Treat the rating as feedback, not a staff quota.

Reference: Google Business Profile Help, "Tips to get more reviews." See the source link on page 12.

MISTAKE 04 / REPEAT BUSINESS

Forgetting your past customers

Be easy to find when they need you again.

A customer can be happy with your work and still forget your company name months later. The invoice is buried, the number was never saved, and the next plumbing problem starts with a fresh search.

Start by leaving a clear record of the completed work and a straightforward way to reach you. Where a customer has agreed to reminders or useful updates, keep those relevant to their actual service history. A reminder should make sense for the equipment and work involved.

A BETTER ROUTINE

1. Make the handoff useful. Include your company name, contact details, work summary, and relevant care or warranty documents.

2. Record preferences. Note the customer's preferred contact method and any agreed reminder. Keep service messages distinct from marketing subscriptions.

3. Reconnect with a reason. Use an agreed check-in, a relevant service reminder, or genuinely useful seasonal information. Avoid invented urgency.

WORDS YOU CAN ADAPT

Hi [Name], this is [Your Name] with [Company]. As agreed after our work on [job], I am checking in about [specific reason]. If you need help or have a question, you can reach us at [contact].

DO THIS TODAY

Improve your completion email so customers leave with your contact details and a useful record of the job.

TRACK THIS

Repeat-customer bookings and whether agreed reminders were completed. Record the actual reason a returning customer contacted you.

MISTAKE 05 / JOB COST VISIBILITY

Pricing without the whole picture

A full schedule does not explain your profit.

Materials and on-site labor are easy to see. Travel, parts collection, payment fees, vehicle costs, office time, and callbacks can be less visible. Owner labor also needs a cost, even when the owner does not receive an hourly paycheck.

Build a consistent estimate of direct costs and a sensible allocation of operating overhead. Then compare the estimate with what actually happened. Count each cost once; for example, do not add payroll overhead again if your loaded labor rate already includes it.

A BETTER ROUTINE

1. List the cost categories. Include labor, materials, subcontractors, disposal, travel, and applicable job fees.

2. Allocate overhead consistently. Use an approach suited to your business with your bookkeeper or accountant. Keep tax treatment separate.

3. Review completed jobs. Compare estimated hours and costs with actuals. Look for repeat causes of overruns before changing your price book.

KNOW WHAT THE NUMBERS MEAN

Illustration only: $1,000 selling price - $600 direct costs - $200 allocated operating overhead = $200 modeled operating profit before income tax and any unmodeled costs. That is a 20% margin on sales, not a 20% markup on cost.

DO THIS TODAY

Review one recently completed job. Write down the time and costs you expected, then compare them with the actual records.

TRACK THIS

Estimated versus actual job costs, using the same categories. A calculated margin is only as complete as the costs included.

MISTAKE 06 / CUSTOMER RECORDS

Keeping the business in your head

The next person should not have to guess.

A gate instruction is in a text. The estimate is in email. Job photos are on a technician's phone. The customer has already explained the issue twice, but the office cannot find the earlier conversation.

Give each customer and property a dependable record. Keep the information needed to serve the job, make it available to the right people, and avoid collecting unnecessary details. A useful record should help the next conversation, not become a dumping ground.

A BETTER ROUTINE

1. Standardize the essentials. Record contact details, service address, job history, current status, next action, and assigned person.

2. Link the supporting material. Keep estimates, approved changes, relevant photos, and invoices connected to the correct customer and job.

3. Control access. Use individual logins and appropriate permissions where available. Keep payment card details out of ordinary notes and photos.

A PRACTICAL CUSTOMER RECORD

Customer / service address / request / agreed scope / last contact / status / next action / due date / responsible person / linked job documents.

DO THIS TODAY

Choose one active customer. Put the essential job information in one record and check that someone else can find it.

TRACK THIS

Active jobs with complete records and a clear next action. Test whether the office can answer a basic job question without chasing the technician.

MISTAKE 07 / MARKETING THAT GETS MEASURED

Buying leads before fixing follow-through

Improve what happens after the inquiry.

It is tempting to respond to an empty calendar by spending more on advertising. First, check whether the inquiries you already receive are being answered, qualified, quoted, and followed up consistently.

New advertising can still be the right move. Make that decision with a basic view of where inquiries come from and what happens to them. Use your own records rather than assuming every missed call would have become a paying job.

A BETTER ROUTINE

1. Record the source. Ask how each new customer found you. Keep "unknown" as an honest option when attribution is unclear.

2. Follow the stages. Count inquiries, qualified opportunities, bookings, and completed paid jobs separately.

3. Check the economics. Compare campaign spending with the jobs it actually produced and their costs. Revenue alone does not show marketing profit.

THE 15-MINUTE WEEKLY CHECK-IN

At your weekly check-in, ask: What came in? What got a response? What booked? What finished and paid? Which open opportunities need a next action?

DO THIS TODAY

Review the last ten inquiries. Record their source and outcome, including those you could not serve.

TRACK THIS

Booked jobs by source and acquisition cost per booked customer. Label incomplete attribution and keep potential revenue separate from actual revenue.

WORKSHEET / PRINT OR WRITE ON A COPY

Where is your business leaking?

Use recent records rather than memory. Choose one change you can actually maintain.

For each statement, mark **Yes**, **Sometimes**, or **No**. A "No" identifies a process to inspect, not a prediction of lost revenue.

Our current routine	Yes	Some-times	No
Every new inquiry goes into one shared list.	[ ]	[ ]	[ ]
Every open inquiry has an owner and a next action.	[ ]	[ ]	[ ]
Every open estimate has a follow-up date.	[ ]	[ ]	[ ]
Completed jobs receive a neutral review invitation.	[ ]	[ ]	[ ]
Agreed customer reminders are recorded and completed.	[ ]	[ ]	[ ]
Job reviews include actual costs and owner labor.	[ ]	[ ]	[ ]
Customer and job documents are easy for the team to find.	[ ]	[ ]	[ ]
We record inquiry sources and actual booking outcomes.	[ ]	[ ]	[ ]

CHOOSE YOUR FIRST REPAIR

The process we will fix first: _____

Who owns it: _____ Start date: _____

The specific change we will make: _____

How we will check it worked: _____

KEEP IT SMALL
A routine the team follows every day is more useful than a complicated system nobody keeps current.

PUT IT TO WORK

Your seven-day action plan

Seven short work sessions. One clearer way to run the office.

DAY 1 **Put every open inquiry in one place.**
Gather unresolved calls, emails, and website inquiries. Give each an owner, status, and next action.

DAY 2 **Bring outstanding estimates up to date.**
Check delivery, record the customer's known decision stage, and set an appropriate next contact date.

DAY 3 **Improve the job-completion handoff.**
Create one completion email with a work summary, contact details, relevant documents, and a neutral review invitation.

DAY 4 **Make past-customer records useful.**
Complete essential records for five past customers. Record any reminders they actually agreed to receive.

DAY 5 **Review the real cost of one job.**
Compare estimated and actual labor, materials, and other costs. Note the biggest difference and its cause.

DAY 6 **Try the handoff test.**
Ask someone with appropriate access to find a customer's estimate, job notes, and next action without your help.

DAY 7 **Review, simplify, and assign ownership.**
Look at what was missed this week. Choose a recurring review time and the person responsible for keeping records current.

Your weekly habit: review open inquiries, outstanding estimates, and upcoming commitments before deciding what needs attention next.

YOUR NEXT STEP

Better relationships. Better follow-through.

Customer relationship coaching through software and eBook-based education.

At TradesProCRM, our coaching comes through eBooks and useful software. Each resource helps you strengthen the everyday routines that turn a first inquiry into a well-served customer and a lasting relationship.

Choose one habit from this guide and practice it consistently. Use the business checkup to find a starting point, put the seven-day plan to work, and review your progress with the people who handle your customers.

USE THESE QUESTIONS FOR YOUR WEEKLY CHECK-IN

- [ ] Did every new inquiry get a response and a next action?
- [ ] Can we find customer details and previous job notes quickly?
- [ ] Does every open estimate have a thoughtful follow-up planned?
- [ ] Are customers clear about our timing, scope, and commitments?
- [ ] Have we followed through on outstanding customer concerns?
- [ ] Which one customer relationship habit will we improve next?

KEEP LEARNING. KEEP IMPROVING.

Visit our growing collection of free eBooks, software, and customer relationship guidance. Learn how to close the deal, provide better customer service, and keep good customers coming back.

Explore TradesProCRM.com

TradesProCRM | YOUR Customer Relations Management Coach

Independent resource note: this guide presents suggested business routines. It does not promise sales, profits, or particular software capabilities. Examples are illustrative.

Review guidance: Google Business Profile Help - Tips to get more reviews. Checked October 27, 2026. Google prohibits review incentives; ask for genuine feedback without selecting customers by expected sentiment.

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