POST-SERVICE CUSTOMER FEEDBACK TOOLKIT

A practical set of survey templates, customer message scripts, and tracking worksheets for HVAC, plumbing, and electrical contractors.

> **Instructions**
>
> Use this toolkit to ask clearer questions, invite honest feedback, spot service issues sooner, and measure what changes over time.

Inside: a five-question survey • SMS and email templates • a response scorecard • a follow-up checklist • an A/B testing planner

1. START WITH A SHORT, NEUTRAL SURVEY

A useful survey measures specific parts of the customer experience without nudging people toward a positive answer. Start with these five questions, then adjust only when your business needs different information.

Recommended starting point: four or five questions, about one minute to complete, with only the overall rating required. Test the actual completion time with customers.

Copy-and-Paste Survey

Introduction
Thank you for welcoming us into your home. We'd appreciate hearing how your visit went. Your feedback helps us recognize good service and identify areas where we can improve. The survey takes about a minute.

Survey question	Response / setup
1. How would you rate the service you received today?	Required. Use the same five-point scale shown below.
2. How would you rate your technician?	Optional. Display the technician's name when practical.
3. How clearly did your technician explain the work performed?	Very clearly / Somewhat clearly / Not very clearly / Not at all clearly / Not applicable
4. Was the problem you called about resolved?	Yes, completely / Partially / No, not yet / Too soon to tell
5. Is there anything else you'd like us to know about your visit?	Optional written comment.

Rating	Label
1	Very poor
2	Poor
3	Fair
4	Good
5	Excellent

Note: Keep the wording and rating labels consistent over time. If you change a question or scale, note the change before comparing results with earlier periods.

2. READY-TO-USE SURVEY INVITATIONS

Send the survey after the customer has had a chance to respond privately. The best timing may vary by job type, so treat your initial schedule as a starting point and test it.

SMS invitation

Hi [Customer first name], thanks for choosing [Company]. How did your service visit go? We'd appreciate your honest feedback. It takes about a minute: [Survey link]

Email invitation

Subject: How was your service visit?

Hi [Customer first name],

Thank you for choosing [Company] for your [service/repair/installation]. We'd appreciate hearing how your visit went.

Your feedback helps us recognize good work and identify where we can improve. Please share your experience using this short survey: [Survey link]

Thank you,
[Name or Company team]

Optional follow-up after no response

Hi [Customer first name], we're following up in case you missed our message. If you have a moment, we'd still value your feedback about your visit: [Survey link]. Thank you.

Message checklist

- [ ] Use neutral language that welcomes both positive and negative feedback.
- [ ] Keep the invitation short and explain how the feedback will be used.
- [ ] Send using the customer's permitted communication channel and preferences.
- [ ] Apply same invitation rules to all eligible customers, not just customers you expect to be happy.
- [ ] Avoid asking the technician to watch while a customer completes the survey.

Timing idea to test: compare a survey sent about one hour after the visit with one sent about three hours later. These are test conditions, not universal best times.

3. MEASURE PARTICIPATION AND SATISFACTION

A high average rating is only part of the picture. Track participation alongside ratings, and use consistent definitions so month-to-month comparisons mean something.

Metric	How to calculate it	What it tells you
Surveys sent	Count of successfully delivered invitations; track failed deliveries separately.	How many customers had a chance to respond.
Completed surveys	Count of surveys submitted.	How much feedback you collected.
Response rate	Completed surveys ÷ delivered invitations.	What share of invited customers responded.
Average rating	Sum of valid overall ratings ÷ number of valid overall ratings.	Average score among customers who rated the visit.
Low-rating %	Overall ratings at or below your chosen threshold ÷ valid overall ratings.	How often low ratings appear among respondents.
Follow-ups open	Count of unresolved feedback items awaiting action.	Whether customer concerns are being addressed.

Monthly scorecard worksheet

Reporting period	Surveys sent	Completed	Response rate	Avg. rating	Low-rating %	Open follow-ups
_____	_____	_____	_____%	_____	_____%	_____
_____	_____	_____	_____%	_____	_____%	_____
_____	_____	_____	_____%	_____	_____%	_____
_____	_____	_____	_____%	_____	_____%	_____

Note: Interpret results carefully

Customers who respond may differ from customers who do not. A larger response count can provide a broader view, but it does not automatically eliminate response bias. Track failed deliveries and eligibility rules, too.

4. TURN LOW RATINGS INTO APPROPRIATE ACTION

A survey score is a signal to investigate, not proof that an employee did something wrong. Check the work order and circumstances before deciding what the response should be.

1. Review the feedback: Read the rating and any written comment. Identify whether the concern is about the technician, communication, scheduling, price, repair outcome, or another issue.

2. Check the service record: Review the work order, approved work, notes, parts status, and any planned return visit. A repair may not be fully verifiable immediately.

3. Assign an owner: Name the person responsible for contacting the customer or coordinating the next step. Set a due date.

4. Contact the customer appropriately: Listen first, clarify what happened, and explain the next step. Avoid promising a refund, free work, or other remedy before the facts and company policy are reviewed.

5. Document the outcome: Record the action taken, the owner, and whether the issue was resolved. Keep customer details in approved company systems.

6. Look for patterns: Review repeated concerns across visits, technicians, job types, or office processes. Use patterns for coaching and operational improvement.

Internal follow-up log

Date	Work order / customer	Concern	Owner	Due date	Outcome / status
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Note: Choose a consistent alert threshold, such as an overall rating of three stars or below. The exact threshold is a business decision; assign responsibility so flagged feedback does not go unanswered.

5. IMPROVE THE SURVEY ONE TEST AT A TIME

Avoid changing several things at once. If you want to know whether timing affects response rates, keep the survey wording, audience rules, and channel the same while testing different send times.

A/B test planner

Plan item	Your notes
Question to answer	Example: *Does sending the survey one hour after the visit produce more completed responses than sending it three hours later?*
Version A	_____
Version B	_____
One factor being changed	_____
Who is eligible?	_____
Test dates / sample	_____
Primary measure	Response rate / completion rate / usefulness of comments
Result and next step	_____

Before you compare results

- ☐ Randomly assign eligible customers to versions when practical.
- ☐ Keep all conditions the same except the factor being tested.
- ☐ Record sample sizes and avoid overinterpreting small differences from small samples.
- ☐ If you change a rating question or scale, note that scores may not be directly comparable with earlier periods.

Keep surveys and public reviews separate

Internal surveys help you understand service performance. Public reviews help prospective customers evaluate your business. Do not invite only customers with favorable internal ratings to leave public reviews or discourage negative reviews. Follow the review platform's current policies and make review opportunities available without filtering by survey score.

6. YOUR FIRST 30 DAYS

Use this checklist to put a consistent feedback process in place without trying to change everything at once.

Week 1: Prepare

→ Choose the five-question survey and confirm the rating labels.

→ Decide which completed work orders are eligible for a survey.

→ Choose the delivery channel and draft the invitation message.

→ Assign someone to review low ratings and unresolved-issue responses.

Week 2: Launch

→ Send surveys consistently to all eligible customers.

→ Keep the overall rating as the only required question where your platform allows.

→ Track delivered invitations, completed surveys, and failed deliveries.

→ Test the survey on a phone and confirm the completion time.

Week 3: Review

→ Calculate response rate, average rating, and low-rating percentage.

→ Review written comments and check any report of an unresolved issue.

→ Compare results by job type or technician only when the data and conditions support a fair comparison.

Week 4: Improve

→ Identify one survey or service-process improvement to test.

→ Write down the test conditions and primary measure before starting.

→ Review whether follow-ups were completed and whether recurring issues need attention.

> **Remember**
> The goal is not the highest possible score. The goal is a reliable view of customer experiences, followed by action that improves service.

*For best results, use the companion **Customer Feedback Scorecard** spreadsheet alongside this toolkit to record monthly results and compare trends. Keep definitions consistent, and treat survey scores as one source of evidence rather than a complete picture on their own.