



# Customer Service Best Practices

Set Your Business Apart

## Customer Service Best Practices to Set Your Business Apart

Whether you're following up with your leads, reminding a customer of an upcoming visit, or sending an invoice after a job is done, good customer communication is at the core of good customer service.

Everything in this ebook is something you can start doing right away, whether you use Jobber or not. If you'd like some assistance taking your customer service to the next level, Jobber's client features can help you organize and communicate more effectively with your customers.

- Keep track of all important client details whether you're at the office, on the way to a job, or out in the field.
- Impress potential clients with detailed, professional quotes.
- Automate client reminder and appointment notifications.
- Automatically send clients a reminder to rebook, request feedback, or send a simple thank you at the end of every job.

If you have any questions or feedback, please feel free to contact us at [academy@getjobber.com](mailto:academy@getjobber.com).

Thanks for reading!

- The Jobber Academy Team

### What's Jobber?

Check out the Jobber features that help you impress your clients.

[Learn More](#)



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# Setting your business up for success

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*Great customer communication starts before you have a personal interaction with a potential customer.*

Customer communication often begins when someone searches for the service you provide and ends up on your website or reading customer reviews. Once they're ready to call and learn more, your telephone etiquette has to be on point.

And if they're impressed enough to book your services, you have to collect and store their information in a way that will keep you looking professional in every interaction going forward.

Let's go over those three stages in more detail.

## Establish your online presence

In a study on local consumer habits, [BrightLocal](#) found that in 2016 only 5% of respondents didn't search for local services online.

*53% of consumers search for local businesses online at least once a month.*

BrightLocal, 2016 Local Consumer Review Survey

Of the overwhelming majority searching online, 53% of them searched for local businesses at least once a month!

With more consumers online than ever, and many of them searching for answers on their smartphones, it goes without saying that having some sort of online presence is an essential part of communicating with customers about your business and service offerings.

In other words, your first act of great customer service is making it easy for people to find you and book your services!

An online presence gives your business credibility. It allows people to confirm your business exists, and your online interactions with other customers can give them a peek at the customer service and quality of service you provide. Being online is simply an all-around great way to engage with potential and existing customers.

That being said, setting up an effective online presence is a huge topic and it can get complicated. But there's no need to be intimidated. You can start small and work your way up to bigger things when you're ready—baby steps!

Here we give you some basic pointers on how to establish your online presence along with some ideas for how to take it up a notch when you're ready.

## **1. Start with social media**

If you use just one social network for your business, make it Facebook. With well over 1.5 billion users in 2016, Facebook has the most users out of all social media platforms. The demographics of [people who use Facebook](#) show that the majority of them are most likely the household decision makers who would be pursuing mobile services such as cleaning, lawn care, snow removal, etc.

To add to that, [Facebook is second only to word-of-mouth](#) as a method of sharing and reviewing businesses.

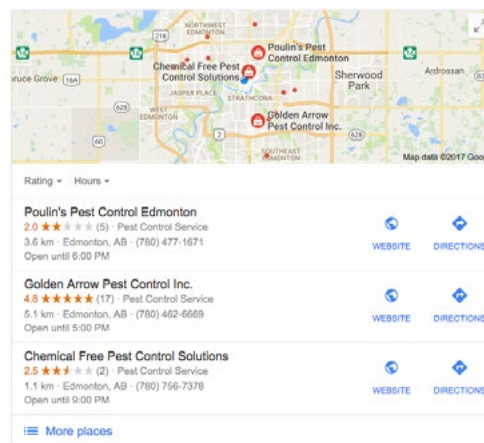
Social media is a space you for you to be creative. Share company updates, seasonal service reminders, special offers, and before and after shots of your work. For more inspiration check out our article where we round up [a month of Facebook post ideas](#) complete with examples from other service business owners.

Once you're ready to establish your business on other channels, [Twitter](#) and [Instagram](#) are natural next steps. But before you bite off more than you can chew, keep in mind that consistency is key when it comes to acquiring and maintaining followers on all social media channels. You want to set up a realistic posting schedule that your followers can anticipate (once a day, twice a week, etc.), and be sure to check your channels often for client questions, feedback, and interactions.

## 2. Gather online reviews

Online reviews are one of the best ways to amplify your online presence. Anything your customers are saying about your company will carry more weight than what you say about your own work. Good online reviews are an authentic way to promote your business and speak to your credibility.

In fact, [91% of consumers read online reviews](#) to determine if a local business is good or bad. We did a quick Google search for Edmonton Pest Control and got the following results:



In this example, which company would you call first?

Of course, [less than favorable reviews](#) may pop up from time-to-time, and in those cases it's best to regard those comments as valuable feedback and consider if they identify ways to improve your process or customer service.

There are a number of places online where you can list your business and start getting online reviews. Your Facebook page, [Google Business Listings](#), and Yelp are great places to start.

As an added bonus, testimonials or quotes from customers can be a great source for website content.

Simply asking happy customers to leave you a review after a job well done will get your review numbers up faster than you think. If you request a review in person, go one step further by following up your request with an email linking to your review page.

### **3. Set up a simple website**

Your website is the home base for your business online, the place people expect to find if they hear about your company through word of mouth.

It should answer the common questions people will have about your company and make it easy for them to sign up or get in touch and become your client. Keep it simple and it will be effective.

You most likely have all of the information you need to set up a website (written down, on a flyer, in your head), so put aside some time to gather all of that valuable content into one document and you'll be ready to go.

You can start out by building a simple website with a free platform like [Wix](#), or you can work with a professional web developer who can assist with your

online strategy and design you a custom website.

For in-depth information on what goes into making a really awesome website, check out our article on [why your field service business needs a website.](#)

Starting a Facebook page, setting up your business for online reviews, and crafting a simple website are all great ways to establish your business online. After all, think about your own experience searching for a product or service provider—you probably started your search online.

The easier you make it for people to find you, the more likely you are to win their business when they're searching for the service you offer!

## **Polish your telephone etiquette**

As so many business relationships start out over the phone, it's important to have a telephone policy and procedure in place. As a business owner, it's your job to ensure that when customers phone in, they're talking with engaged and knowledgeable staff.

Do you have a standard procedure in place for how you and your staff answer the phone? When you can't get to the phone, do you have a professional voicemail greeting?

Our friends at [Pink Callers](#), a virtual receptionist service, are pros on the phone and have the following advice to share with business owners.

### **Answering the phone**

Your business phone should be answered within 3 rings. You don't want to leave your customers (or potential customers) waiting for someone to greet



them. When answering the phone, there are a few things to keep in mind:

- Answer the phone with a positive greeting that includes the name of the person answering the phone and the name of your business.
- The disposition of the person answering the phone matters. Try smiling before answering the phone, as this [can have a positive impact on inflection and tone](#).
- Be authentic! Just because you are being professional, doesn't mean you need to be stale or stuffy. Make sure to answer the phone in a way that is a good representation of your company and brand.

## Placing a customer on hold

There will inevitably be times that you need to place a customer on hold.

By starting the phone conversation off on the right foot, with a positive disposition and professional greeting, you've already built trust with the customer and they will be okay with you placing them on hold.

Remember, always ask permission to place a customer on hold and thank your callers for waiting once you take them off hold.

*Always ask permission to place a customer on hold and thank your callers for waiting once you take them off hold.*

## Voicemail for your service business

You and your team won't always be able to get to the phone within 3 rings and that's okay!

In the event that you or your team can't answer the phone, make sure that you have a professional voicemail that encourages your customers to leave a message. A professional voicemail will build trust with your customers and keep the conversation going.

Your voicemail greeting should:

- State the name of your business and business hours.
- Explain why the phone call may have gone to voicemail. Is the phone answered only during certain times? Does the line go to voicemail when you're on the phone with another customer?
- Set expectations around when your customer can expect to receive a call back.

Great telephone etiquette doesn't take much effort, but it's one of those details that can make or break a client relationship. Check in with your team (including yourself) from time to time to ensure everyone is practicing good habits when it comes to interacting with clients on the phone.

## **Put a client management system in place**

You might have a phone full of customer names and numbers, a spreadsheet of invoicing records, and an online calendar tracking jobs that you're using to manage your customer relationships.

This setup might be working for you, but may include double entry, making it a bit of a time suck.

From a customer communication perspective, some of your records may only be accessible when you're at the office, meaning you and your employees are in the dark when you're out in the field and face-to-face with a customer.

Enter [online CRM software](#).

A CRM, or customer relationship management system, is exactly what it sounds like: a system to track relationships with customers. With a CRM you can access all your client details no matter where you and your team are. In other words, you have the answer to every question and look like a total pro during each customer interaction.

## More sales and better customer service

By tracking customer relationships in one place, you can more easily see [which quotes you need to follow up on](#), and identify opportunities to reach out to customers who haven't booked your services in a while.

*It's never too late or too early to start using online CRM software.*

Bonus: you can automate a lot of customer service functions, setting up reminders to [prevent last minute cancellations](#) and sending [follow-up](#) emails after jobs to improve customer satisfaction.

## Where to begin

It's never too late or too early to start using online CRM software.

Use it from the very first day of your business operations and you'll have a complete relationship history with each and every one of your clients.

Switch to an online CRM software once you're well into running your business and you'll free up a lot of time from admin tasks to spend on other important work.

## Van Wu, owner, Trust Home Comfort

Trust Home Comfort provides furnace, HVAC, air conditioner, and water heater services in Edmonton, Alberta, Canada.

When Van Wu and his business partner started Trust Home Comfort, Van brought sales experience to the table, while his partner brought the service industry background.

*“Keeping customers has more impact than getting new ones,” says Van. “That’s my sales background insight. Tradespeople are more likely to just start doing the work.”*

So with growth in mind, Van wanted to launch with CRM software in place to manage customers efficiently—from acquisition, to scheduling jobs, to following up. We’re honored that he ended up trying and sticking with Jobber. To learn more about Van’s Jobber experience and the features he can’t do without check out the [Trust Home Comfort case study](#).

# Winning a customer's business

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*Your business is set up to provide great customer service before a potential client even books a job. You have a web presence (including solid reviews), your telephone etiquette is on point, and you have a CRM in place to manage and access all of your client details in the office or on the road.*

You've made the service provider shortlist, and now it's time to come out on top against your competition and land the job.

There are two things you can do to get ahead, and they both involve demonstrating superior customer communication skills:

1. Send them a professional quote that gives them a clear picture of the value you're providing.
2. Follow-up with your busy client to book the job.

Let's start off with writing a professional quote.

## How to write the perfect quote

No matter how you caught your potential client's attention, one thing is true: you work hard to generate leads. Whether potential customers contact you by phone after finding your business online or through a [customer referral](#), when you are talking to a lead you want to make sure you get the job!

Sometimes customers don't need a quote and are ready to put you to work. But other times, you may be competing against 2 or 3 other service companies to land a job. In cases when you're competing against other companies for business you'll want to set yourself apart. There are a few things you can do when providing quotes for customers to make sure your business stands out.

## **Email your quotes**

If a customer phones you asking for a price, don't stop at just providing the price over the phone. Of course, this is a necessary step and a great start, but take your quotes one step further.

Collect the customer's [contact information in a CRM](#) (we covered why this is important in the previous chapter) and then offer to email the quote so they have a record of the quote in their email inbox. Emailing your quote will showcase your professionalism, your dedication to customer service, and will help you stand out from the competition.

By collecting customer information and emailing quotes, you're also able to easily follow up with your customer, which is a great way to win more jobs.

## **Writing the quote**

So we know that we should email quotes to our clients, but what do we include in the quote? Writing quotes doesn't have to be complicated; however, there are a few things you want to make sure you include:

### **1. Company name**

This one seems obvious, but it's important. For your company to stand out, your customers need to be aware of your company. Make sure that you include your company name and, if possible, include your company logo

on your quotes (Jobber makes it easy to include your branding on a quote template).

## **2. Contact information**

Make sure that your contact information is clear and easy to find so your customer can easily take action to accept your quote and book the job.

## **3. Include line items**

A good quote will help your customers understand what you are providing and what they are getting. Customers want to know what they are paying for, so list out each product and service with the associated price.

## **4. Notes**

Not all quotes are the same. If the quote is valid only for a certain amount of time, or there are special details that your customer needs to know, be sure to include this information in the quote so there is no confusion.

Jobber's [quoting feature](#) allows you to format all of these details into a professional, customizable quote. You can email your client directly through Jobber, and even schedule reminders to follow up with your clients.

# **4 reasons to follow up on your quotes**

What happens after you talk to a lead, learn about the services they are looking for, and send them a professional quote?

Do you just wait for your client to contact you and hope you win the job?  
Don't just wait!

One of the best ways to close more deals and generate more business is to follow up with your leads after you have sent them a quote. Let's dive into 4 reasons why you should be following up.

## **1. Follow up on quotes and you'll win more jobs**

Sometimes, all it takes to close the deal is to ask for the sale. Yup—it can be that simple.

Your clients are busy. Sometimes they'll ask for a quote with the full intention of the job starting right away, but then they get busy and forget to respond. The quote might move to the bottom of their email inbox and is no longer top of their mind.

Following up on your quotes is a way to make things easy for your client. Often they just need a reminder before they move forward with accepting the quote.

## **2. You'll demonstrate superior customer service**

As we've covered in this book, customer service begins before the job starts—customer service begins as soon as you start a relationship with the client.

It is likely that when you send a quote, your potential client has requested quotes from a few service providers. Following up on your quotes demonstrates your company's commitment to customer service.

Your client might not always remember you, but if you remember them, your customer service will stand out.

## **3. Leads are expensive**

Leads cost money. Whether you are advertising on traditional channels, or using sites like [Angie's List](#) to get leads, you are spending time and money to get leads.



You don't ignore your paying clients, so why would you ignore leads that you've paid money for?

A lead that has already engaged with you is more valuable than one that hasn't. Make sure you're getting the most value out of the leads you work hard to get!

## 4. Following up on quotes is easy

Getting leads that are interested in your services is the hard part. Once you've sent off a quote, following up is easy.

Put together a process so you don't forget to follow up on your quotes. The longer you wait to follow up with your client, the more cumbersome the process becomes. **We recommend the following process:**

1. If you send your customer a quote, make sure you're collecting all their important contact information in a CRM so it's easy for you to follow up with them.
2. Set yourself a reminder to follow up in 2-3 days, or allow Jobber to automatically set reminders for you. A simple email or quick phone call is all that is required.
3. We recommend following up 2 to 3 times with your client. Sometimes you won't be able to get a hold of your client and they won't get back to you—that's okay. That's the nature of business. But don't delete the quote! Using [quoting software like Jobber](#) allows you to keep the quote on file. If the client does contact you at any time in the future, you have a full record of what you've quoted.

Put together a process for following up on quotes: you'll provide better customer service, build better relationships with your clients, and generate more business.

## **Get to work**

Once your new client accepts the quote, it's time to roll up your sleeves and get to work.

One of the great things about a well-written quote is that you and your client know exactly what the job entails. Use your quote as the base for any work order you need to provide to employees in the field so they have the information they need to get the job done.

# Customer communication during the job

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*Great news—after your potential client has found your company online, been impressed by your online reviews, and you've sent them a professional quote, you're company has been hired to do a job.*

This is the fun part! Doing the work is the reason you run a service business.

Managing a client's expectations is an important part of any service job and is a key element in providing a good customer experience. Whether you're reminding clients of an upcoming service appointment or communicating any last minute changes, there are opportunities throughout the job for your customer service to stand out.

## **How to prevent last minute cancellations**

Last minute cancellations are frustrating and expensive. In addition to

*...remind your customers of their upcoming appointment or service call. A reminder gives your customer an opportunity to cancel in advance if needed.*

the value of the service visit, other financial costs include employee time and wages, mileage on your vehicle, and the cost of gas.

Cancelled appointments can be a problem, but they don't have to be. An effective communication strategy with your customers can help prevent last minute cancellations and improve your customer service.

So how do you communicate with your customers to prevent last minute cancellations? The answer is simple—remind your customers of their upcoming appointment or service call. A reminder gives your customer an opportunity to cancel in advance if needed. Customers also appreciate the reminder—customer service for the win!

Typically, there are 3 ways you can remind your customers of an upcoming service appointment: a phone call, an email, or a text message.

While there is a nice personal touch to a phone call, there are a couple of challenges with this method of reminding your customers of an upcoming appointment. Sometimes customers can be hard to reach over the phone and if they don't have voicemail you can't leave a message. Another challenge with phoning every customer before their service appointment is that this process can take a lot of time. The point of reminding customers about their upcoming appointment is to save time—not to create more work!

With email or text message reminders, you'll always leave a message and you don't run the risk of a customer not answering the phone.

Also, setting up a process to email or text message customers before an appointment is easily repeatable by following 3 easy steps:

## 1. Assign a point person

If you're going to send out appointment reminders, you need a person at your company who is in charge of the communication. When you send out a reminder, you are opening the door to new customer communication. The point person will need to answer any customer questions or reschedule appointments if required.

## 2. Create a template

Once you decide who will handle any questions that pop up from your appointment reminders, you'll want to create reminder templates. The templates should work for all potential appointments and customers. We've included a couple examples below:

### EMAIL TEMPLATE

*Hi [customer name],*

*This is a friendly reminder from [your company name] that we have an upcoming service appointment. Date:\_\_\_ Where:\_\_\_ Time:\_\_\_*

*If you have any questions or concerns, please don't hesitate to get in touch with us by email at [point person email address] or by phone at [point person phone number]*

*Sincerely,*

*[point person name]*

*[your company name], [point person phone number]*

### Text Message Template:

*Hi [customer name],  
This is a reminder from [your company name] about our upcoming appointment at [appointment date and time]. Please contact us at [point person phone number] if you have any questions.*

Your templates might vary a bit from the examples above, but remember to always include date/time information about the appointment as well as your contact information.

### 3. Send Your Reminders

The last step in this process is to start sending out your reminders.

Reminders can be sent out manually by your point person or you can automate this process through software like [Jobber](#). Jobber's [Client Reminder Emails and SMS Client Reminders](#) help speed up the process of sending out these reminders. Using software also eliminates the possibility of human error when sending out the reminders.

## Communicate breakage and damage to your customers

Sometimes mistakes happen—and that's okay. If you're running a company where employees are out in the field, there is always the chance that something may be accidentally damaged or broken.

At Jobber Academy, we've talked about the importance of creating a damage and breakage policy for residential cleaners, and the same logic applies to all

other field service industries. You want to run a company your customers can trust so communicating breakage or damage to your clients is imperative in maintaining this trust.

Make sure field workers communicate to management any breakage or damage as soon as possible. From there, it's your responsibility to communicate the situation to your client. A phone call is ideal, but in situations where you can't reach your client on the phone an email will work.

#### EMAIL TEMPLATE

*Hello [client name],*

*I have just been contacted by [name of employee] in regards to [a breakage/damage incident] and wanted to contact you directly to see how we can remedy this as quickly as possible.*

*Here's the situation: <Insert what happened.>*

*We're sorry this happened and are more than happy to [repair or replace the item / fix the damage] at no charge to you. We take full responsibility, and want you to know we'd like to get this [fixed / resolved / repaired / refinished / replaced] immediately.*

*Sincerely,  
[name of manager]  
[phone number]*

Include paperwork and any necessary photos. You'll cover your bases, and turn an unfortunate incident into an opportunity to demonstrate your business' professionalism.

## Scheduling the next visit when the job isn't done

You want the job complete and so does your customer, but sometimes unforeseen circumstances prevent you from completing a job on time. Maybe your team needs a new part or extra time to complete a job. Sometimes a rain storm or bad weather prevents you from completing an outdoor job.

In these circumstances, it's important to communicate with your customer about any delays and how your team is working towards getting the job completed as soon as possible.

**A process for dealing with these situations involves the following 3 steps:**

1. Develop an internal procedure so that key members of your team know why there was a delay and what the next steps are. Do you need to buy new parts? Are you waiting for the weather to clear up? Do you just need more time?
2. Reschedule the visit.
3. Communicate to your customer the delay, the reason for the delay, and rescheduled visit.

Depending on the type of service, this may be done in person, over the phone, or over email. Helpful tip: [Jobber Client Reminders](#) help you automate the customer communication if necessary.

Nobody likes when jobs run late or are delayed, but with a simple company policy to communicate delays to your client, you'll demonstrate your professionalism and keep your client happy.



# Wrapping up a job well done

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*You've completed the job, providing excellent customer service by communicating with your client every step of the way. But your work in providing great customer service is not over.*

Once the job is done, you may need to follow-up to ensure customer satisfaction. Other times you'll need to send an invoice and collect payment.

No matter the reason you're following up, you'll want to make sure your customer service continues to shine. Making sure your customer service stands out after the job doesn't have to be difficult and you can get started by following a few best practices.

## **Start by sending a follow-up email**

One of the easiest ways to improve your customer service is by sending your customers a follow-up email when a job is complete.

There's no simple follow-up email that works for all businesses in all situations, and it can be a bit overwhelming to figure out exactly what you want to email your customer. To get the ball rolling, we've put together 4 examples of what you can include in your emails that will give you a great start in following up with your customers.

## 1. Let your customer know that the work is complete

When a job is complete, you still have the responsibility to stay in touch with your customers. A simple email follow-up that thanks the customer for their business can go a long way.

Let your customer know the job is done and make sure you're top of mind when your customer needs to schedule their next appointment. This will help your customer service stand out and open the door for future communication.

### EMAIL EXAMPLE

*Hi [customer name],*

*Our team has completed [description of job/work here]. If you have any questions about the work or service, please don't hesitate to contact me directly.*

*Thanks for your business. We look forward to working with you again in the future.*

*Best,*

*[name]*

*[phone number]*

## 2. Ask for feedback

Most customers won't provide feedback unless you ask for it. It's your job as a business owner to find out how you and your team are doing!

Asking for feedback in a follow-up email is a great way to hear from customers and improve your business.

Sometimes you'll get negative feedback. While this isn't what you want to hear, it's important that you do receive this feedback. Negative feedback gives you an opportunity to find out how you can improve your service. Also, if you receive negative feedback, it provides you with an opportunity to remedy a negative situation and continue the relationship with the customer.

Other times, you'll receive positive feedback—awesome! When you get positive feedback from a client, don't stop there. There may be opportunities to get a customer testimonial, online review, or book their next appointment.

To get feedback you can simply add a few sentences to the email when you let your customer know the job is done:

### EMAIL EXAMPLE

*We work really hard to provide the best experience for our customers and are always looking for ways to improve. If you have any feedback please reply to this email directly. We read every email we get and appreciate your help in improving our customer experience.*

### 3. Encourage repeat business

Are there opportunities for you to build repeat business after an initial appointment?

A one-off cleaning appointment can turn into a regular monthly cleaning. An initial appliance repair visit can turn into a maintenance contract. A spring cleanup for a lawn care company can turn into weekly visits.

Make sure to include information about your different packages and if possible, offer an incentive though a new customer discount.

#### EMAIL EXAMPLE

*Hi [customer name],*

*Our team has completed [description of job/work here].*

*We're currently offering a 20% discount for new customers when they sign up for one of our weekly or monthly packages. If you'd like to take advantage of this offer or have any questions about any of our other services, please contact me directly.*

*Thanks for your business. We look forward to working with you again in the future.*

*Best,*

*[name]*

*[phone number]*

## 4. Reach a new audience

Your customers value opinions from their friends and colleagues. A referral to your business from a customer can speak volumes about your credibility and top quality service.

If you're currently running a referral program then a follow-up email is a great place to promote your program.

### EMAIL EXAMPLE

*Hi [customer name],*

*Our team has completed [description of job/work here].*

*Did you know that your friends and family can earn [percentage or dollar discount] off their first service with us? All they have to do is mention your name when they book with us and we'll make sure you get the same discount off your next service!*

*Thanks for your business. We look forward to working with you again in the future.*

*Best,*

*[name]*

*[phone number]*

# Collecting payment

You've done an excellent job communicating with your customers up to this point. How do you communicate with your customers when it's time to collect payment?

Many service companies are able to collect payment in advance or in the field when the job is completed, but sometimes companies need to send invoices or collect payment after the crew has left the job. Often field service businesses deliver friendly customer service that exceeds expectations but fail to deliver good customer service when it comes time to collect payment.

How do you deliver exceptional customer service when it's time to collect payment?

## 1. Make it easy for your customers to pay

However your customers want to pay should work for you. So make sure you're set up to handle multiple forms of payment and the type of payments your customers prefer.

Many customers like the [convenience of ePayments](#).

*“Believe it or not, your clients do want to pay you. It may be you who is making it difficult to do so. Do something about it!”*

Jennie Moore, Cloud Accountant and Jobber Certified Advisor

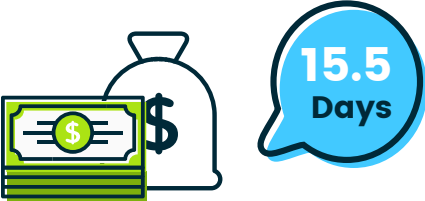
By offering ePayments to your clients, they are able to pay for your services, by credit card, online, and in person.

Jobber customers bill for over \$100 million worth of services each month using our software. And Jobber supports customers as they record all kinds of different payments.

### What have we learned from all of these transactions?

#### Cash

Think getting paid in cash is the best way to clear a balance? Not so fast.



#### Check

Snail mail, a trip to the bank, clear those checks—a 3 week waiting game.

#### Bank Transfer

It takes almost a month for a bank transfer to pop up in your inbox.



#### Money Order

The time it takes to purchase and deposit a money order adds up.



## ePayments

See your payment for a job well done in only a week! Include ePayment links with invoices so your customers can pay online, and store client credit cards for future payments.

[Jobber Payments](#) is an ePayment option available to all Jobber users at no monthly fee and with a competitive payment processing rate.

## 2. Clearly communicate payment terms on your invoices

If you [send invoices](#), make sure they are professional and easy to understand. Professional invoices include the following details:

### 1. Company name and branding

This one seems obvious, but it's important. If your invoice ends up in a stack of paper, your customer needs to know who the invoice is from. Make sure that you include your company name and, if possible, include your company logo on your invoices.

### 2. Company contact information

Make sure that your contact information is clear and easy to find. If your



customer has any questions about the invoice, they need to be able to contact you.

### **3. Line items**

Customers want to know what they are paying for, so list out each product and service with the associated price.

### **4. Billing terms and late payment charges**

An important part of a professional invoice is a clear, polite statement about your payment period and what will happen if the customer doesn't pay on time.

### **5. A specific due date**

It can be tempting to use a generic statement about due dates on all your invoices, something like, "Payment must be issued within 30 days upon receipt." Don't do this—it doesn't seem to convince people of the importance of paying the invoice. Instead, include the specific due date for the specific invoice.

## **3. Deliver what your customers expect**

Nobody likes getting surprised when it comes to receiving invoices and bills.

If you provide regular services or maintenance for a client, make sure that they are on a regular billing schedule and know what to expect.

If you do one off jobs and invoice after the job is complete, make sure that your client isn't waiting too long before they receive the invoice. Your clients will want to settle up with you quickly, and forgetting to send an invoice makes payment an inconvenience for them.

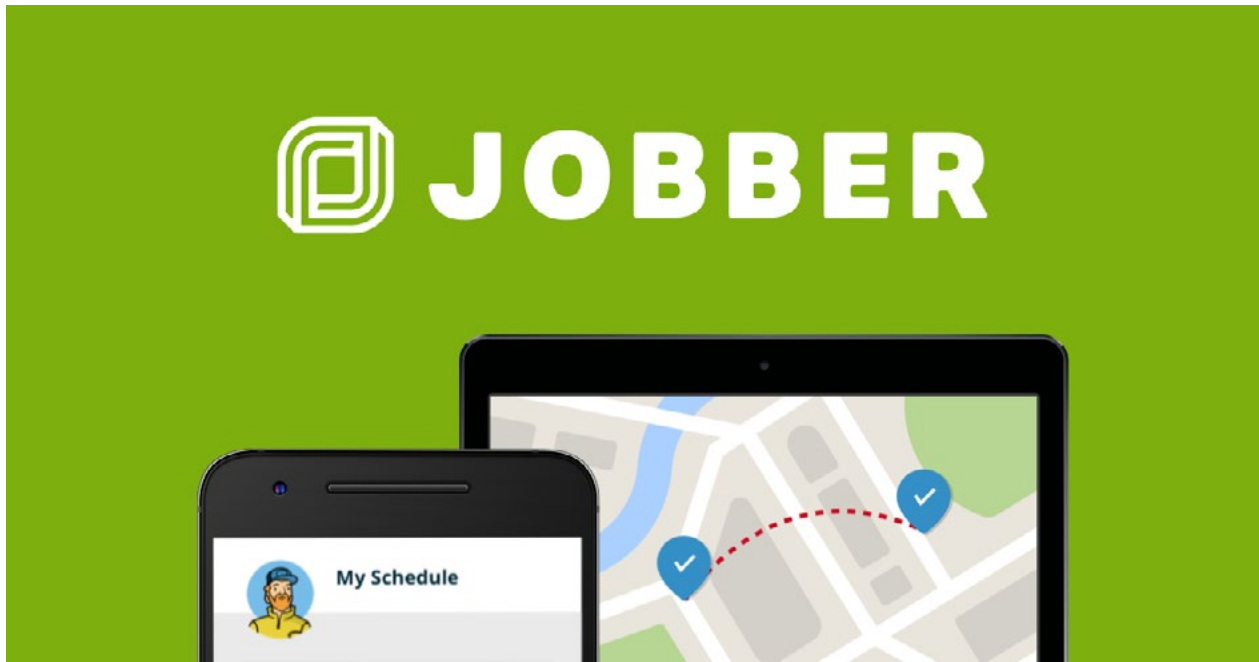
# That's a wrap!

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*From start to finish, these are the key points before, during, and after a job that you can demonstrate your business' commitment to customer service using great customer communication strategies.*

As we mentioned in the introduction, you can implement many of these strategies without using Jobber, but using software like Jobber to keep all of your business information in one place can help automate, and streamline your business processes. It can save you time, keeps you organized, and, ultimately, help you run a better business.

Check out Jobber's [full list of features](#), and check out our Jobber Academy articles on [GPS waypoints](#), [batch invoicing](#), [job forms](#), and [Jobber Payments](#), to learn more about the impact they can have on your business.



# Run a better service business

## Jobber's features help you with:

- Invoicing and payments
- Scheduling
- Customer service
- Team management
- Job management

Free up time for work that matters when you use Jobber's business management software to help schedule your team and get paid quickly for your work.

[Learn More](#)