

**The growth playbook:**  
**5 proven strategies**  
**from home service Pros**  
**who've scaled past \$2M**

# Table of contents

Click on each section to jump to its corresponding page.

1

Abstract  
Executive summary

3

Strategy 1  
Use data to drive confident  
decisions

5

Strategy 2  
Build systems so your business  
runs without you

7

Strategy 3  
Assemble a strong team that grows  
with your business

9

Strategy 4  
Deliver a standout customer  
experience that scales

11

Strategy 5  
Systematize your marketing to  
drive growth

13

What's next?  
Choose your path to scale

14

Conclusion  
Housecall Pro:  
Built to grow with you

Abstract

# Executive summary

You've built more than a business—you've built a reputation. A crew you trust. A fleet on the road. A name that holds weight in your market. And now, you're asking a different question:

## How do I get to the next level?

For growing Pros, the real risks are wasted time, shrinking margins, and systems that can't keep up. Whatever got you here won't get you there.



That's what this guide is for. It's your playbook for going from steady revenue to the next opportunity, whether that's expanding to new locations, growing your team, landing commercial contracts, or **preparing for sale**.

We spoke to business owners and coaches who've done it: Pros who've scaled to and past seven figures in revenue, hired their first office team, rebuilt their pricing, expanded into commercial work, or added new markets. They made key shifts in how they operate, lead, and grow.

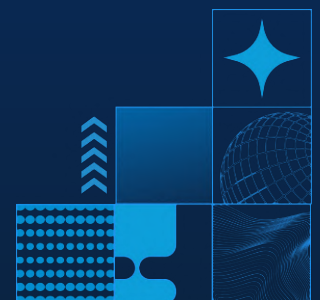
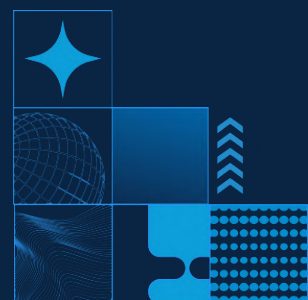
### You'll learn how to:

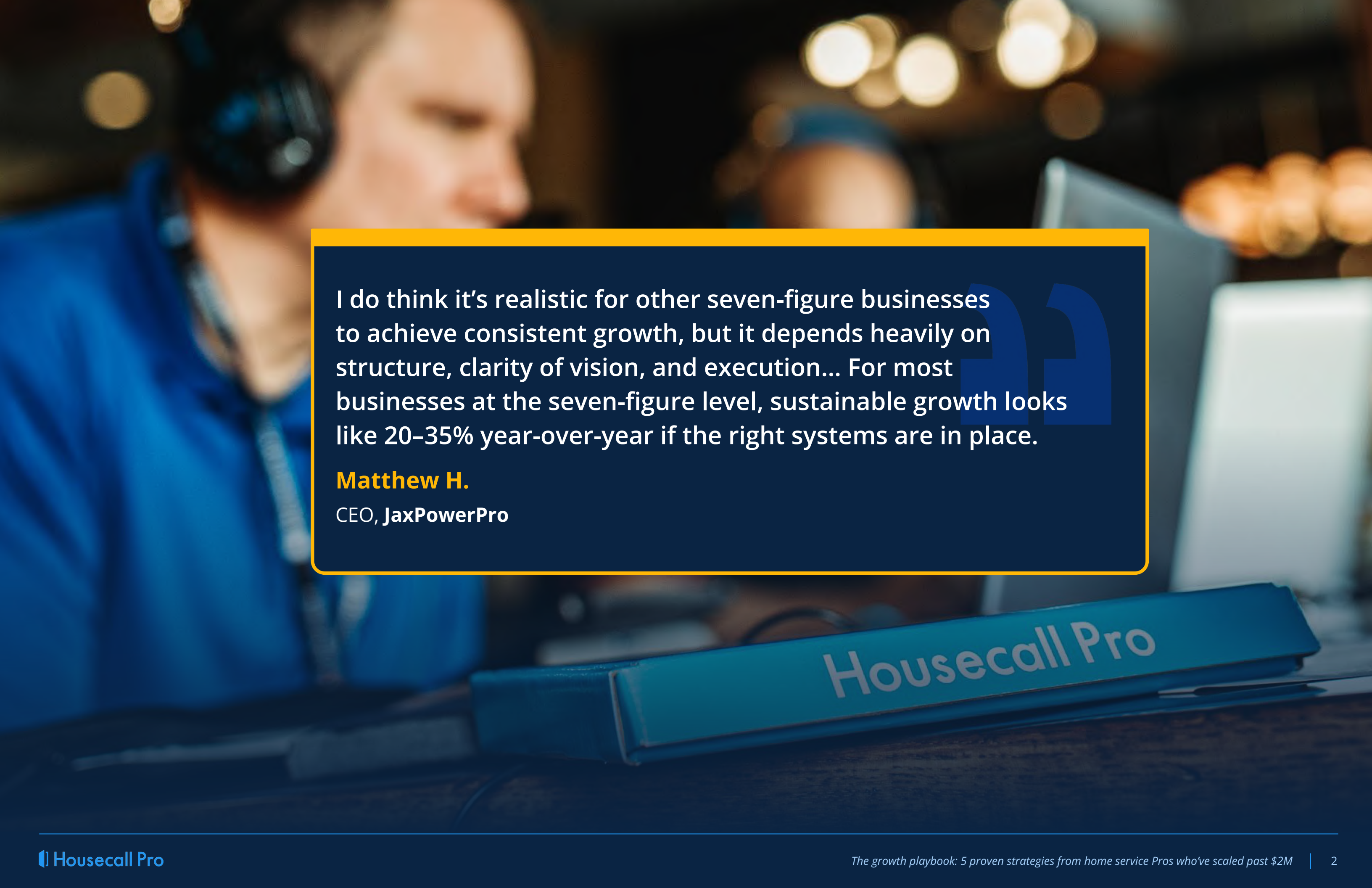
- Turn gut calls into confident, data-driven decisions.
- Build systems that run without you.
- Assemble a team that sticks, scales, and represents your company well.
- Deliver a customer experience that stands out from the competition.
- Develop a marketing engine that keeps you top of mind and brings in the right customers.



Alongside real quotes and strategies from Pros, you'll also find tools and systems that can help you implement the shifts, like AI, job templates, role permissions, and review automation—all powered by Housecall Pro.

**Because scaling to the next level doesn't have to mean doing more. It means doing it differently.**





I do think it's realistic for other seven-figure businesses to achieve consistent growth, but it depends heavily on structure, clarity of vision, and execution... For most businesses at the seven-figure level, sustainable growth looks like 20–35% year-over-year if the right systems are in place.

**Matthew H.**

CEO, JaxPowerPro

Strategy 1

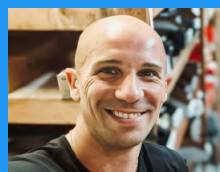
# Use data to drive confident decisions

Instinct got you here. Data takes you further.

At this stage, your decisions shape your team, your margins, and how smoothly everything runs. You don't need to be a data nerd to run a tighter ship. You just need to track what drives your margins, your crew efficiency, and your growth.



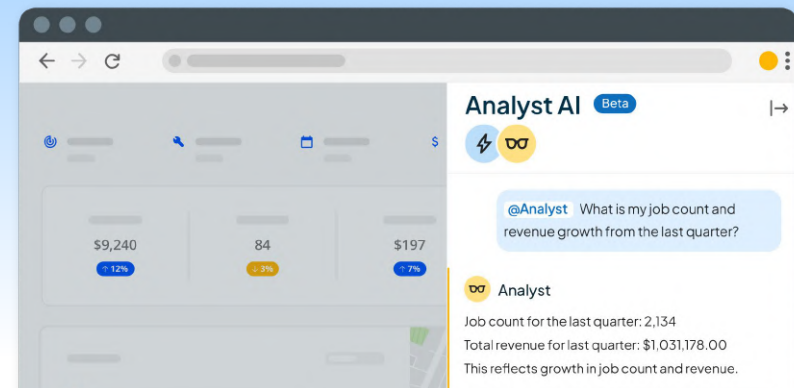
### INDUSTRY LEADER INSIGHTS

	<b>Matthew H.</b>	CEO, JaxPowerPro	Housecall Pro customer
	Scaled from founding to \$2M+ and 11 employees in three years		
Industry	Residential & commercial electrical services		
Top tip	<i>"You have to take risks, but try to take smart risks. Try to understand your finances as best as you can so you can make data decisions, not emotional decisions."</i>		

Matthew founded JaxPowerPro in 2022 and scaled the business by treating data like a growth tool. He put this into practice by using data early and often, even while he was spending most of his day on the truck. Here's what helped him stay clear, efficient, and ready to grow:

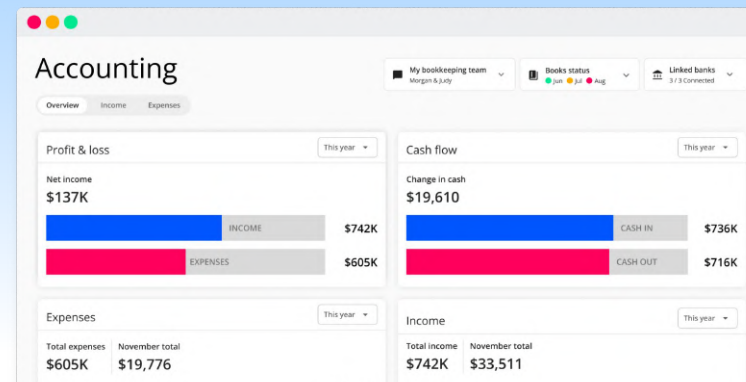
- 1. Learn your business from the inside out.** Matthew started in the field so he could understand every moving part: tools, systems, and customer flow. That firsthand experience gave him the foundation to make smart decisions as he grew.
- 2. Start tracking before you "feel ready."** Instead of waiting to scale, Matthew began measuring key metrics from day one. Early tracking helped him spot patterns and tighten operations before issues snowballed. Review revenue by crew to spot which teams are producing strong margins and which ones need coaching.
- 3. Catch financial blind spots early.** One of Matthew's biggest lessons? He wished he'd hired a bookkeeper sooner. Knowing your numbers in real time gives you confidence to grow.
- 4. Make data part of every big decision.** Before hiring or ramping up marketing, Matthew pulls months of job data to see where the peaks, dips, and trends lie. That's how he plans based on what's real, not what "feels right."
- 5. Estimate based on the team doing the work.** As Matthew scaled, he had to stop pricing jobs based on how fast he could do them. Instead, he built estimates around the average time it would take his techs. That's how you avoid underbidding and protect your profit.

# 3 tools to make the shift



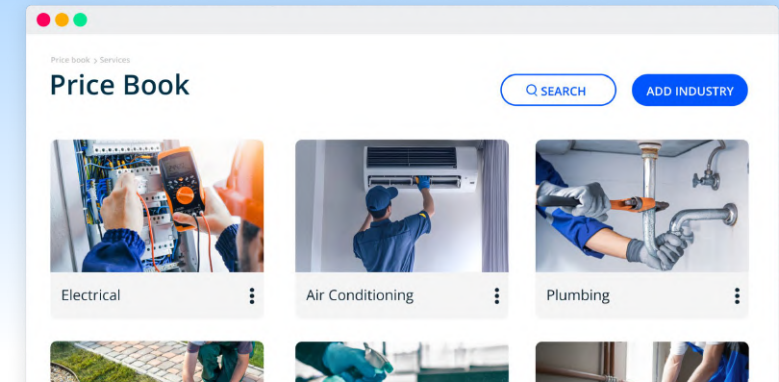
## AI analysts:

Spot busy seasons, slowdowns, and high performers using **AI tools**, so you can plan accordingly and grow faster. Housecall Pro's **Analyst AI** gives you fast answers to your job volume, revenue, and team performance.



## Financial insights:

See what's making you money (and what's not) in real time. Housecall Pro's **accounting tools** can help you monitor your cash flow, handle books, prepare reports, and sync transactions.



## Pricing software:

Smart pricing **templates** protect your margins as costs fluctuate. Housecall Pro's **Price Book** allows you to build service-based price lists that automatically reflect current labor, material, and overhead costs.

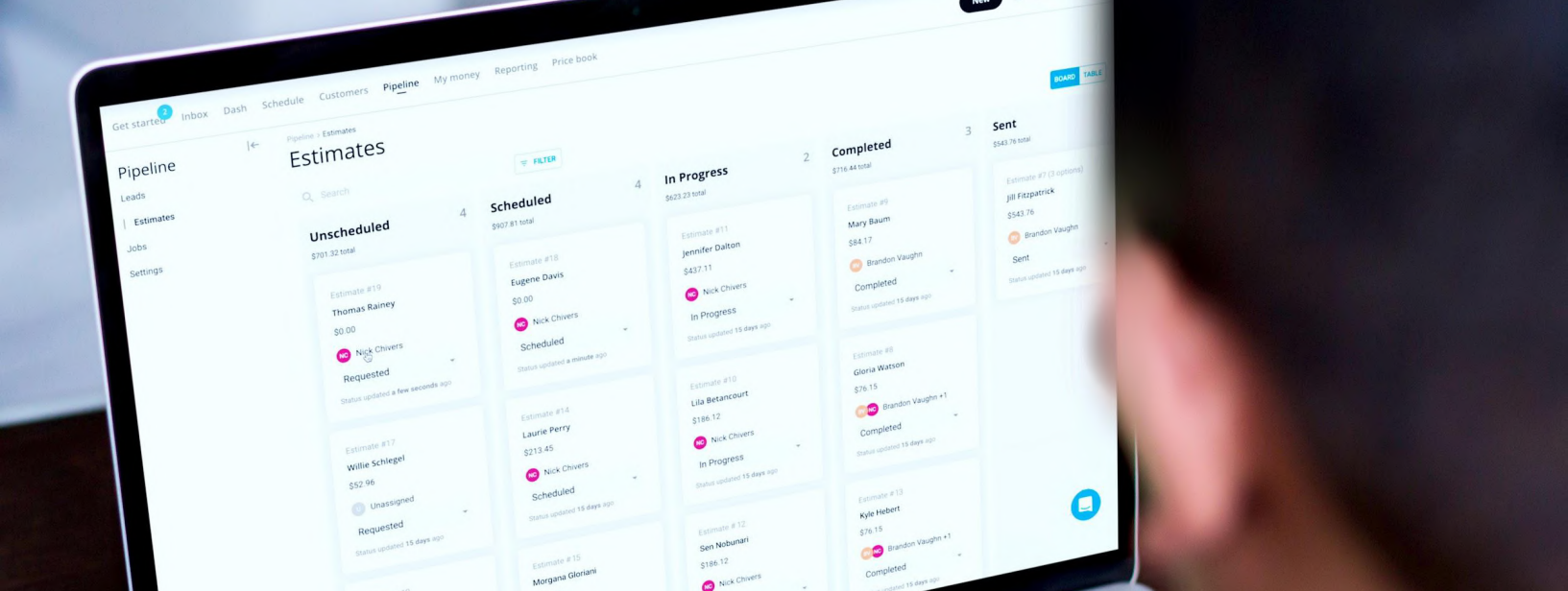


Strategy 2

# Build systems so your business runs without you

You can't scale if you're stuck in the weeds.

Many owners feel like things fall apart when they're not around. But the most successful Pros build systems so their business can run without them.



Chris scaled NW Moss Removal because he built systems that didn't rely on him. At Housecall Pro's [2025 Spring Summit](#), he shared these habits that helped him make it happen:

- 1. Track your time to find the real bottlenecks.** Chris started logging his days in 15-minute chunks and found he was spending over 30 hours a week just writing estimates. That wake-up call pushed him to delegate and automate faster.
- 2. Get help before you think you're ready.** Chris hired a virtual assistant early and offloaded nearly all of his emails and proposals. It freed up his time to focus on high-impact tasks like hiring, recruiting, onboarding, and long-term growth plans.
- 3. Turn your know-how into scalable systems.** Instead of repeating instructions, Chris recorded quick Loom videos and used AI tools to turn them into standard operating procedures.
- 4. Automate the follow-up that eats your time.** Chasing down open quotes? Chris set up pipeline tools that automatically send reminders and keep deals moving.
- 5. Make expectations visible and repeatable.** Weekly huddles and scorecards help Chris' team stay aligned and accountable. This keeps the business running smoothly.

### INDUSTRY LEADER INSIGHTS



Chris O.

Owner & Operations Manager, NW Moss Removal

Housecall Pro customer

Scaled from \$800K to \$2.7M and 9 employees

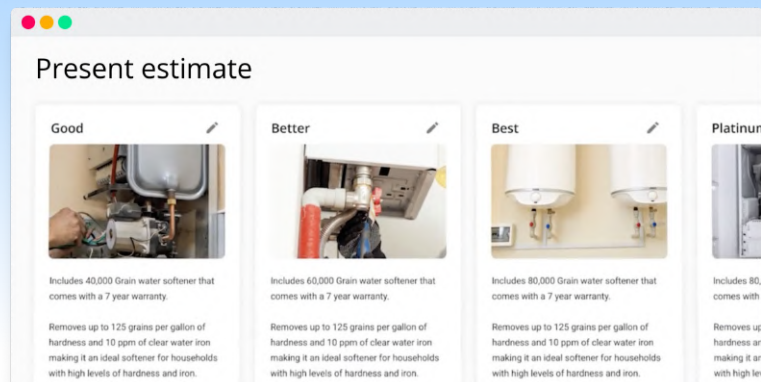
Industry

Exterior cleaning services

Top tip

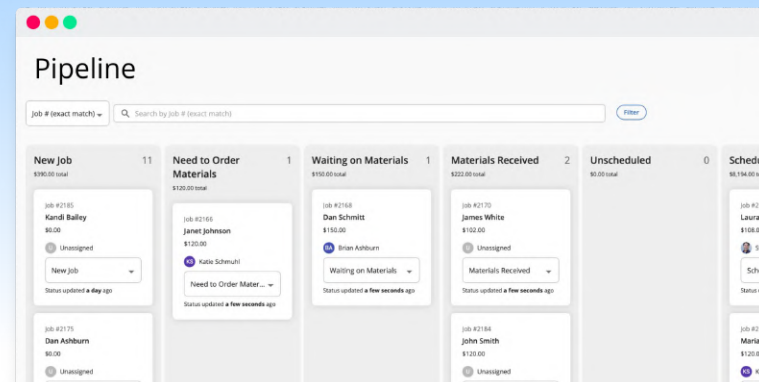
*"It really gives you the time [to scale] when you can get those \$10/hour tasks off your plate to find those \$1,000/hour tasks, even if you don't know what they are."*

# 3 tools to make the shift



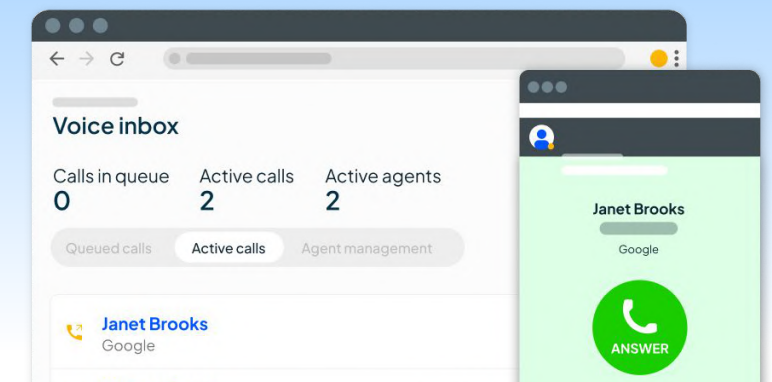
## Automated estimates:

Quote with accuracy while saving time. Housecall Pro's **Estimates** tool allows you and your team to send polished quotes with pre-set line items, pricing rules, and customer messaging.



## Pipeline tools:

Automated follow-ups save you from chasing every open estimate. Housecall Pro's **Pipeline** keeps deals moving with scheduled reminders and quote tracking.



## Call answering tools:

Admin support enables you to scale quickly by taking care of follow-ups, phone calls, and scheduling. Housecall Pro's **virtual assistants** have scheduled over \$110 million worth of booked jobs.

**Housecall Pro customers save an average of 8.6 hours per week.**



Strategy 3

# Assemble a strong team that grows with your business

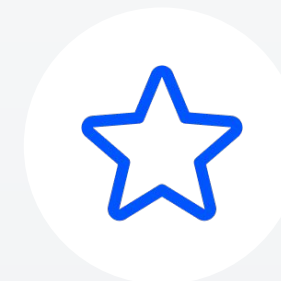
You're not just filling seats anymore. You're building a team.

With **86% of Pros** citing the labor shortage as their biggest hiring challenge, you need to find people who take pride in their work, represent your brand well, and grow with the company.

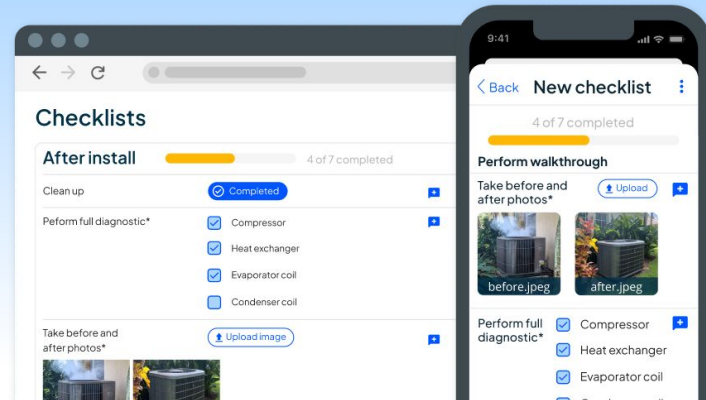
INDUSTRY LEADER INSIGHTS			
	<b>Kedma O.</b>	Housecall Pro business coach	
	Has coached over 10,000 home service businesses on systems, hiring, and funding		
Industry	Coaching for residential & commercial trades		
Top tip	<i>"One of my things I state in every onboarding is, 'We are a 5-star company, but any of our employees can make us 1-star at any moment.'"</i>		
	<b>Matt C.</b>	Housecall Pro business coach	
	Former NASCAR performance coach turned Housecall Pro business strategist. Built and sold his own cleaning company—now helps Pros build high-performing teams.		
Industry	Home services & leadership development		
Top tip	<i>"High performers want to win, so they're going to show up 10 minutes early or stay five minutes late... because they want to win. And that's an indicator of where your people are at."</i>		
	<b>Jorge B.</b>	Owner, Prime AC & Heat	Housecall Pro customer
	Scaled to \$4.5M in revenue, 9 employees, and 7 vehicles		
Industry	HVAC		
Top tip	<i>"Bring the right people on board. As any company goes into that growth mode and they're scaling, you're only as good as the people that you hire."</i>		

Kedma and Matt have coached thousands of Pros on building high-performing teams that stick and scale. Jorge, an HVAC business owner, brings firsthand insight into how strong leadership and team culture drive retention. Here are six key strategies, based on their collective experience, for creating a workplace where great employees want to stay.

- 1. Map out a career path and train early.** Even if you're a small shop today, show your techs how they can grow from level one to level five. A simple org chart can turn a job into a career. Jorge hires with this **development mindset**, not just a "fill the seat" approach.
- 2. Design onboarding that sets the tone.** Matt stresses the importance of structured onboarding. The first 30, 60, and 90 days are when expectations, habits, and culture get built. Show new hires exactly what success looks like from day one.
- 3. Own your role in retention.** Jorge's leadership isn't just operational—it's personal. He sets a high bar for retention and morale by tying the business's success to his team's quality of life.
- 4. Reward the whole person, not just the paycheck.** Kedma recommends thinking in terms of total compensation. Time off, team meals, recognition, and growth matter as much as pay.
- 5. Focus on flexibility.** Yes, you can offer a four-day workweek. Yes, you can prioritize work-life balance. If it helps you keep your best people, Kedma says it's worth figuring out.
- 6. Make culture a priority.** Matt defines culture as the personality of your company and says that it must be shaped intentionally. Think core values, branded gear, tool stipends, safety routines, and clear expectations to show your team you're serious.

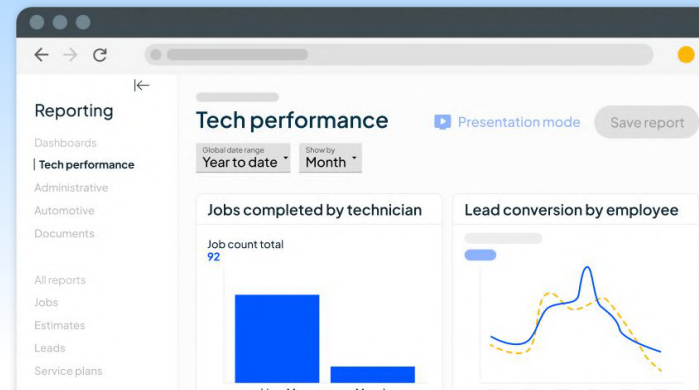


# 3 tools to make the shift



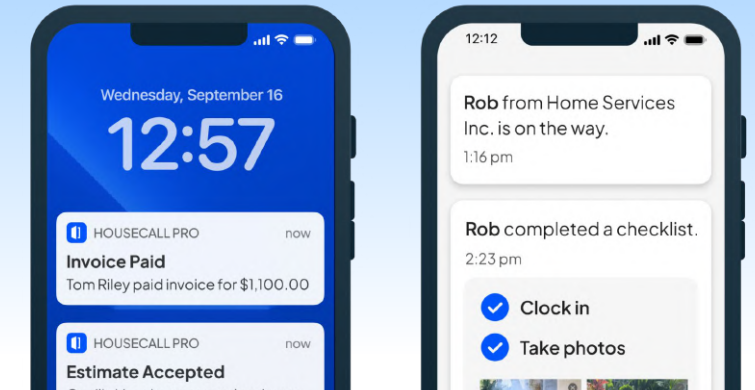
## Onboarding checklists:

Structured onboarding gives new hires a path to succeed fast. Housecall Pro's **Checklists** let you create customizable tasks to keep your team on track.



## Performance dashboards:

Performance insights help you coach top performers and course-correct where needed. Housecall Pro's **reporting tools** show estimate conversion rates, upsells, job ratings, and more at both the team and individual levels.



## Mobile tools:

Give your crew on-the-go access so they can work fast without the admin holdup. Housecall Pro's **mobile app** (also available in **Spanish**) offers instant access to schedules, job info, and customer history in the field. And with **Expense Cards**, team spending is easy.

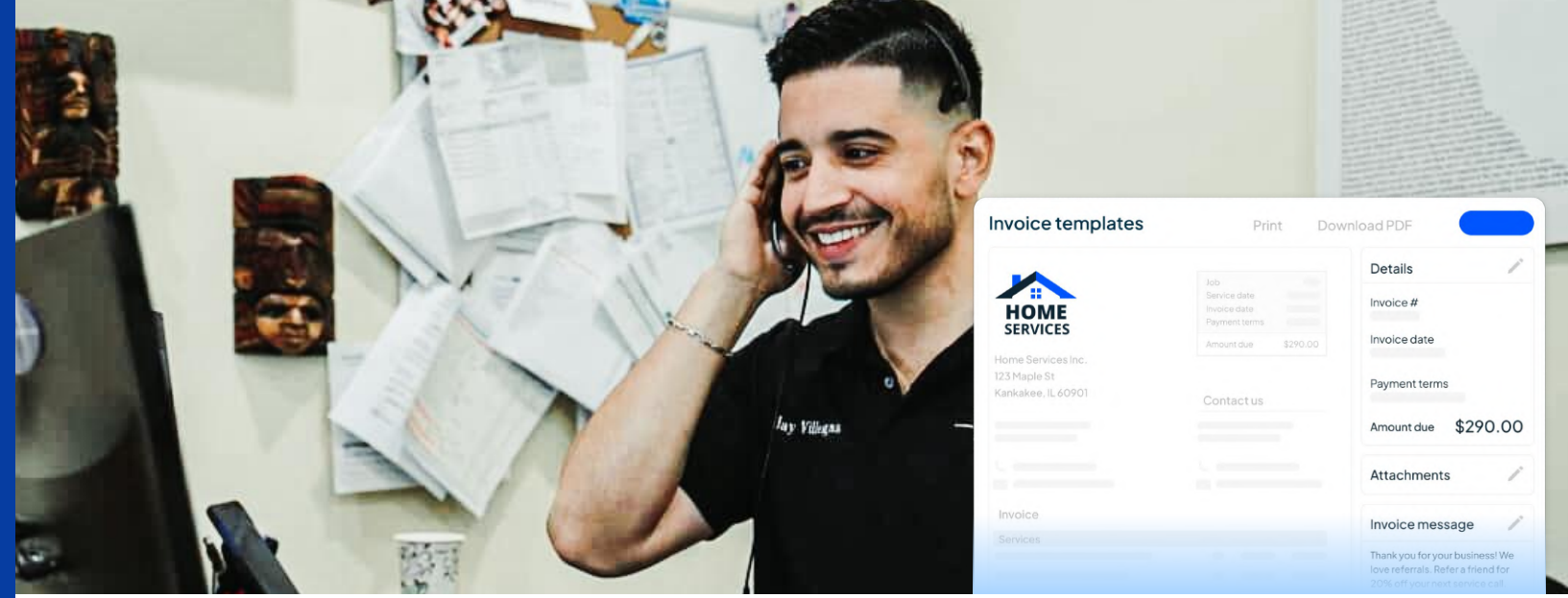


Strategy 4

# Deliver a standout customer experience that scales

Customer experience (CX) is no longer just a nice-to-have.

As you grow, how customers feel when they interact with your business matters more than ever. You're up against big brands and slick operations. Customers expect consistency before, during, and after the job. Top Pros systematize their brand so it shows up the same way every time.

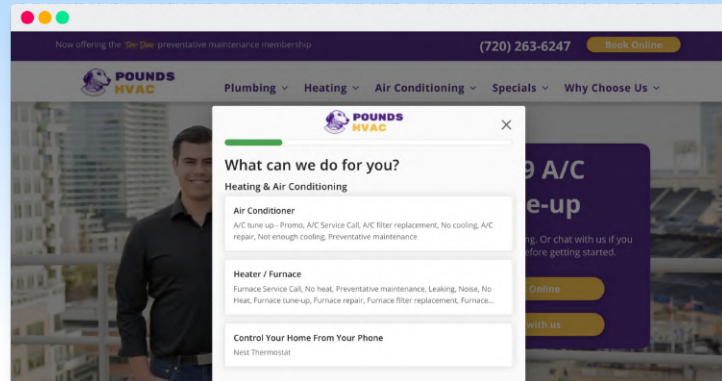


Shasta and Jay each turned scattered tools into a professional customer experience. Here's how they built CX systems that helped them compete with chains, win commercial work, and grow with confidence:

- 1. Standardize your estimates and quote templates.** Use a single, professional format across your business. From first contact to final invoice, Shasta helps ResiBrands franchisees deliver a consistent end-to-end experience—no matter how large or small the team is.
- 2. Brand your touchpoints.** Use consistent confirmation messages, follow-ups, and invoices that reflect your company's voice and logo.
- 3. Track every opportunity.** Jay's team follows up on every quote. This is especially important for commercial bids, where details are more complex and the stakes are higher.
- 4. Make retention the default.** Jay's team offers every customer a branded membership option (the "Cowboy Kool Club"). It helps reinforce the habit, creates accountability, and gives you insight into how often customers are saying no, so you can adjust your pitch or improve your offer.
- 5. Reinforce your brand everywhere.** Yard signs, invoices, texts—every interaction should look and feel like your business. Shasta and Jay emphasize brand consistency, especially when you're scaling.

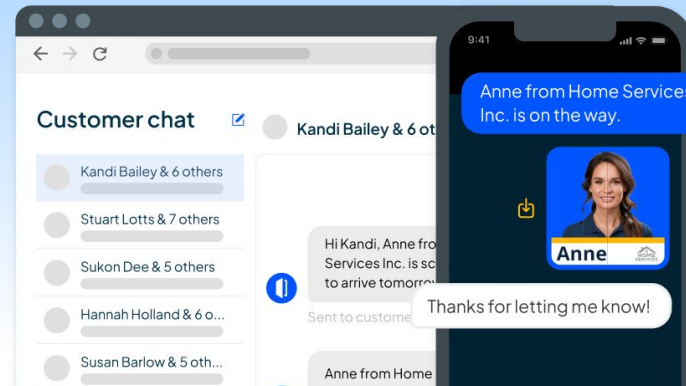
INDUSTRY LEADER INSIGHTS			
	<b>Shasta W.</b>	Director of Sales Support, ResiBrands	Housecall Pro customer
	Supports franchisees across the ResiBrands network		
Industry	Residential & commercial painting		
Top tip	<i>"I just make sure that all of our franchisees are running things efficiently from job tags and are able to get the most accurate data."</i>		
	<b>Jay V.</b>	Owner, Frontier Air Conditioning	Housecall Pro customer
	Scaled from \$1M to \$6M while building a team of 20+ employees		
Industry	HVAC		
Top tip	<i>"Keep track of your clients. Make sure you let them know that, 'Hey, I know it's been a year—by the way, I still exist.'"</i>		

# 3 tools to make the shift



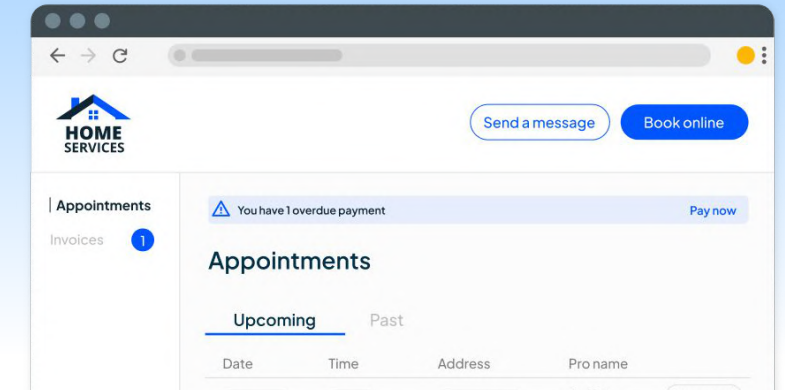
### Online booking:

Let customers schedule services 24/7 through branded web forms that sync with your live calendar. Housecall Pro's **Online Booking** helps you remove friction and enhance customers' first impression of your business.



### CRM software:

Deliver a uniform experience, even across different crews or franchise locations. From onboarding and **job workflows** to **quoting** and **follow-ups**, Housecall Pro gives you a shared system that adapts to each team's needs while keeping your CX consistent.



### Client accounts:

A self-service experience makes your business seem larger, responsive, and professional. With Housecall Pro's **Customer Portal**, your customers can review past jobs, pay invoices, book follow-ups, and receive updates in one centralized place.

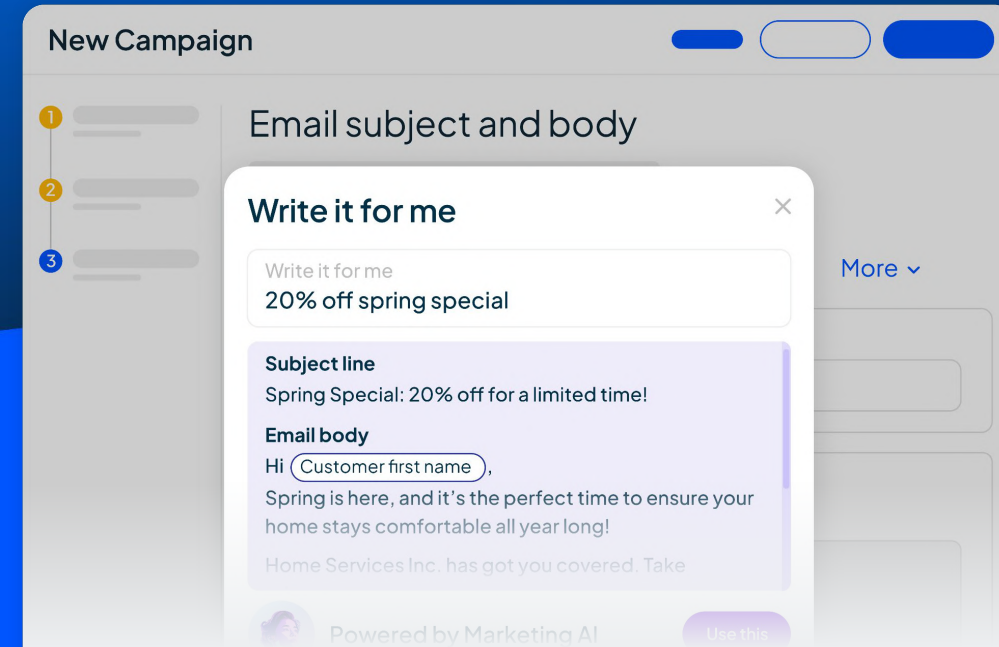


Strategy 5

# Systematize your marketing to drive growth

At this stage, word-of-mouth isn't enough.

You need a marketing engine that brings in the right customers and keeps your brand top of mind. To get there, treat your marketing like your operations: consistent, automated, and built to scale.



Will approaches marketing with the same intention and structure he brought to the rest of his business. Here's how he built a local, AI-enhanced growth engine that reaches every customer and keeps his brand top of mind.

- 1. Automate your review collection.** Will's team sends review requests via SMS after each job, followed by a quick check-in call.
- 2. Turn great reviews into new referrals.** Happy customers are often eager to share, but they need a nudge. After asking for a review, set up email campaigns to send personal thank-yous, links to share, and light referral asks.
- 3. Segment your customers for smarter follow-ups.** Will tracks services and client types (like "property manager" or "recurring maid") using tags in Housecall Pro. This lets him tailor outreach, sending the right message to the right customer at the right time. It's how he boosts repeat work and builds long-term loyalty.
- 4. Use AI to create content that converts.** From postcard campaigns to polished service descriptions and seasonal emails, Will uses AI tools in Housecall Pro to quickly generate on-brand content that resonates with his customer segments—and drives leads.
- 5. Stay visible locally.** Will's team drops "Sorry we missed you" hangers at nearby houses after each job and posts year-round on Craigslist. These "five-on-five" hangers are placed at the five houses to the left and right of a serviced home, boosting local awareness and trust by showing neighbors that someone they know already hired you.

## INDUSTRY LEADER INSIGHTS



Will H.

CEO, A-1 Cleaning

Housecall Pro customer

Grew to 45+ employees with 690+ Google reviews and a 4.9-star rating

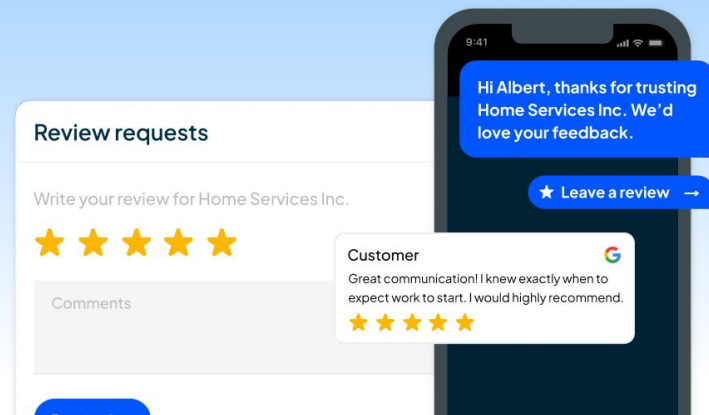
Industry

Cleaning

Top tip

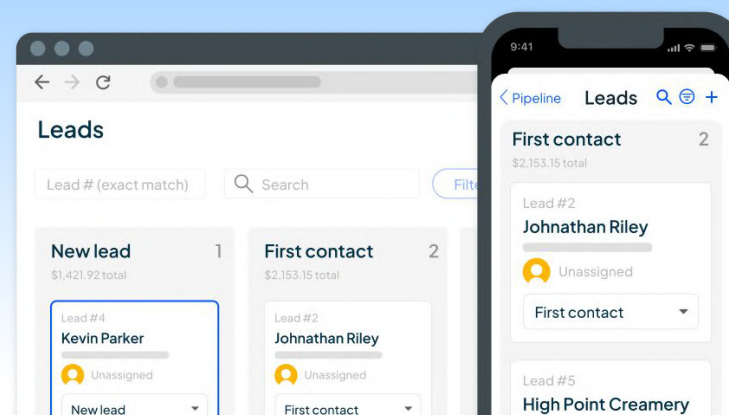
*"For every customer that you're dealing with—it's a lost customer if you don't ask for a review."*

# 3 tools to make the shift



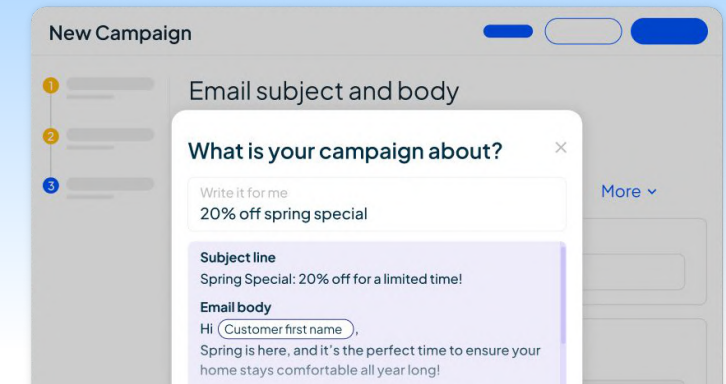
## Review automation:

Automated reviews boost your online reputation with less effort, so you can see where you shine. Housecall Pro's **Marketing Center** can help you trigger SMS or email **review requests** after each completed job.



## Customer segmentation:

Customer tags let you follow up with the right message at the right time. Housecall Pro's **tag feature** can help you sort customers by service type, urgency, or region.



## AI integrations:

AI-powered marketing tools can help you win more jobs and stay top of mind year-round. Use Housecall Pro's Marketing Center and **Marketing AI** together to send polished campaigns, create service descriptions, and draft effective emails in minutes.

**Housecall Pro customers generate an average of 40 customer reviews per year.\***

\*Of those who received at least one review.



What's next?

# Choose your path to scale

You've got the visibility and the momentum. Now it's about deciding what kind of growth fits your vision.

## STAY INDEPENDENT

Run a tighter, more profitable business. Automate workflows, track performance, and build long-term loyalty.

### INDUSTRY LEADER INSIGHTS



**Brett C.**

Co-Owner,  
**Chimney  
Monkey**

Housecall Pro  
customer

*"Make the time to find the stuff that's going to fit for your business... in the end, your return on investment and that time spent looking are well worth what you're going to get on the backend."*

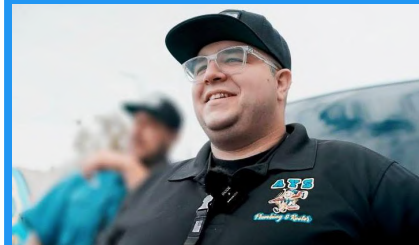
Chimney & dryer vent services

Scaled to \$2M in revenue, 6 trucks, and a team of subcontractors

## EXPAND OR FRANCHISE

Add new markets. Go commercial. Make your customer experience your biggest differentiator. The most successful Pros deliver service that feels local even as they grow.

### INDUSTRY LEADER INSIGHTS



**Michael L.**

Owner, **AYS  
Plumbing &  
Rooter**

Housecall Pro  
customer

*"We have a large operation—mistakes happen. And when they do happen, we get in front of them. We stop everything that we're doing, we get in front of that client... and we turn it around."*

Residential & commercial plumbing

Scaled from 1 truck to 26 employees and 20 vans in 2 years

## SELL OR STEP BACK

Even if you're not ready to sell, start building a business that runs without you. Buyers look for clean financials, documented systems, and a customer base that transfers easily.

### INDUSTRY LEADER INSIGHTS



**Preston H.**

Owner, **Gecko  
Garage Doors**

Housecall Pro  
customer

*"A lot of how [buyers will] put a value on your company is how in-depth your customer database is and how accessible it is to transfer to their database."*

Garage door repair & installation

Rebranded and scaled to 5 trucks with standout local recognition

## Conclusion

# Housecall Pro: Built to grow with you

Whatever path you're on, Housecall Pro gives you the systems to get there.

- Automate the busywork so your team can focus on what matters.
- Monitor profit, performance, and job volume in real time.
- Keep every customer interaction consistent and professional.

Talk to our team to see how you can scale your business >



I absolutely love what Housecall Pro has done for my business. We've grown fourfold in the last 3 years, and Housecall Pro has scaled with us.

**Eric L.**  
Co-Owner, Shine-A-Blind

