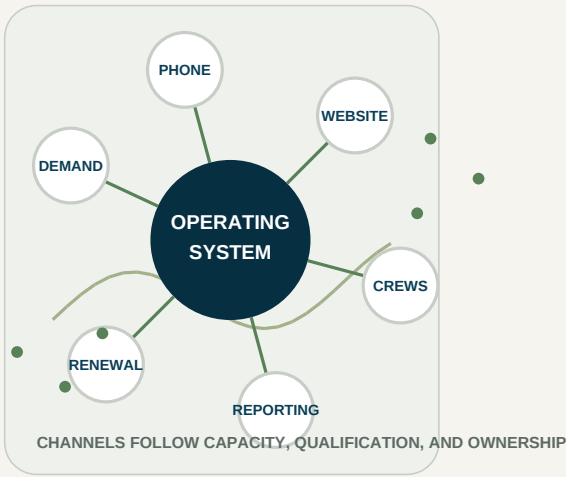


AI & AUTOMATION

How to Turn Completed Jobs Into Reviews and Referrals

A post-job workflow that asks at the right moment and sends service problems to a person first.



THE CONSTRAINT

Review automation fails when every completed work order triggers the same request. The company must distinguish a successful completion from an open issue, warranty visit, billing dispute, or client who already responded.

USE THIS WHEN

Use this when completed jobs are recorded consistently in the CRM or field software.

DO NOT START HERE

Do not request a public review while an unresolved service or billing issue is open.

Inputs to gather before the first meeting

- 1 Completion trigger and job types
- 2 Issue and callback status
- 3 Review destinations
- 4 Referral offer or request process

The five-step playbook

Run the steps in order. A channel should never move faster than the operation that receives the work.

01 Choose the trigger

Use final completion, approved walkthrough, paid invoice, or another reliable milestone. Avoid triggers that fire before the customer sees the finished work.

02 Add service-recovery gates

Check open issues, callbacks, complaints, unpaid changes, and warranty status. Route these records to a person instead of a review request.

03 Ask plainly

Use a short request that names the completed service and provides one clear link. Do not script the review or offer a reward for positive wording.

04 Invite referrals separately

After a positive response or later touchpoint, ask whether the customer knows someone who needs the same type of work.

05 Record the outcome

Track request sent, review received, issue raised, referral given, and no response. Stop repeat asks when the customer acts.

Measure the operating result

These measures keep the playbook tied to booked work, delivery capacity, and client retention.

01
Eligible jobs

02
Review request rate

03
Reviews received

04
Referrals created

Thirty-day rollout

WEEK 1
define completion and issue gates.

WEEK 2
write requests and referral path.

WEEK 3
connect triggers and exclusions.

WEEK 4
launch and review exceptions.

Stop and scale rules

- Open service issues block the request.
- The customer chooses the wording and rating.
- Referrals follow a completed relationship, not a cold transaction.

Launch checklist

- ☐ Reliable trigger chosen
- ☐ Issues excluded
- ☐ Request neutral
- ☐ Links tested
- ☐ Referral owner assigned
- ☐ Repeat asks stopped

One playbook fixes one constraint. We run the whole growth system. AI, website and reporting from \$2,000/mo. Ad spend is excluded.

BOOK A GROWTH AUDIT