The Referral & Repeat Business Playbook

Turn past clients into a steady stream of referrals and repeat work

By the SmallBiz Marketing team
Contractor marketing specialists · 20+ years of marketing experience

smallbizmarketing.net

INSIDE THIS PLAYBOOK

Turn past clients into a steady stream of referrals and repeat work.

01 PART 1: The essentials

02 Your cheapest leads

03 Your first 60 minutes

04 Build your client list

05 The follow-up calendar

06 Template: referral ask

07 Template: neighbor note

08 Partner referrals

09 Email tools

10 Monthly checklist

11 PART 2: Going deeper

12 Deep dive: why past clients are your best marketing

13 Deep dive: building a partner network

14 Deep dive: the neighborhood effect

15 The big picture: your best leads already know you

16 Where referrals come from

17 Where to spend your time first

18 Your 12-week referral timeline

19 Real-world scenario: turning past clients into a pipeline (illustrative)

20 Troubleshooting: referral problems

21 PART 3: Tools you can use today

22 Worked example: 3-month check-in

23 Worked example: partner introduction

24 Worksheet: your referral system

25 Common mistakes to avoid

26 FAQ

27 30-day referral calendar

28 copy-ready templates

29 referral tracker

30 glossary

31 Recommended tools

32 Bonus: the contractor marketing system on one page

33 Bonus: your weekly marketing hour

34 Bonus: how fast to reply to a lead

35 Bonus: master checklist

36 Bonus: when to get help

PART 1

The essentials

The core steps, in order. Start here.

SECTION 02

Your cheapest leads

Past clients already trust you. A simple follow-up system turns them into repeat work and referrals at almost no cost.

SECTION 03

Your first 60 minutes

- Export or write down your last 25 clients
- Mark the ones who were happiest
- Send three referral-ask messages today

SECTION 04

Build your client list

- Export clients from your job management software or phone
- Keep name, email, address, project type and completion date

RECOMMENDED TOOL

Jobber

Stores your client list and history in one place.

Visit Jobber at getjobber.com →

SECTION 05

The follow-up calendar

- 1 week after: thank you and review request
- 3 months after: check-in and care tips
- 1 year after: anniversary message and referral ask
- Seasonal: short email before your busy season

SECTION 06

Template: referral ask

> *"Hi [Name], it's been a year since we finished your [project]. We hope you're still enjoying it. If you know anyone planning a remodel, we'd be grateful for an introduction. We take great care of every referral."*

SECTION 07

Template: neighbor note

> *"Leave a short note with neighbors when you start a job: who you are, what you're working on, and how to reach you. Always be respectful of noise and parking."*

SECTION 08

Partner referrals

- Designers and architects
- Tile and stone showrooms
- Realtors who need pre-sale updates
- Other trades who don't compete with you

SECTION 09

Email tools

Start with any email platform that has a free tier. Send a short, personal email, not a newsletter full of ads.

SECTION 10

Monthly checklist

- [ ] New clients added to the list
- [ ] Follow-ups sent on schedule
- [ ] One partner coffee or call

PART 2

Going deeper

The strategy behind each step, with frameworks and diagrams.

SECTION 12

Deep dive: why past clients are your best marketing

A homeowner who loved your work is your most believable salesperson. Their friends and neighbors trust them more than any ad. Yet most contractors never contact clients again after the final invoice.

Staying in touch keeps you top of mind for the next project and for the moment someone asks, who did your bathroom? A few thoughtful messages a year are enough.

- Past clients already trust you
- Referrals usually close faster and with less price pressure
- A few touches a year keeps you top of mind

SECTION 13

Deep dive: building a partner network

Designers, architects, showrooms, realtors and complementary trades all meet homeowners before or after you do. A small network of partners who trust your work can send steady, high-quality leads.

Start with three partners. Show them recent projects, explain your process and make referring easy. Always keep them updated on the clients they send you and thank them every time.

- Start with three strong partners, not twenty weak ones
- Show your best work and explain your process
- Update partners on referred clients
- Refer work back when you can

SECTION 14

Deep dive: the neighborhood effect

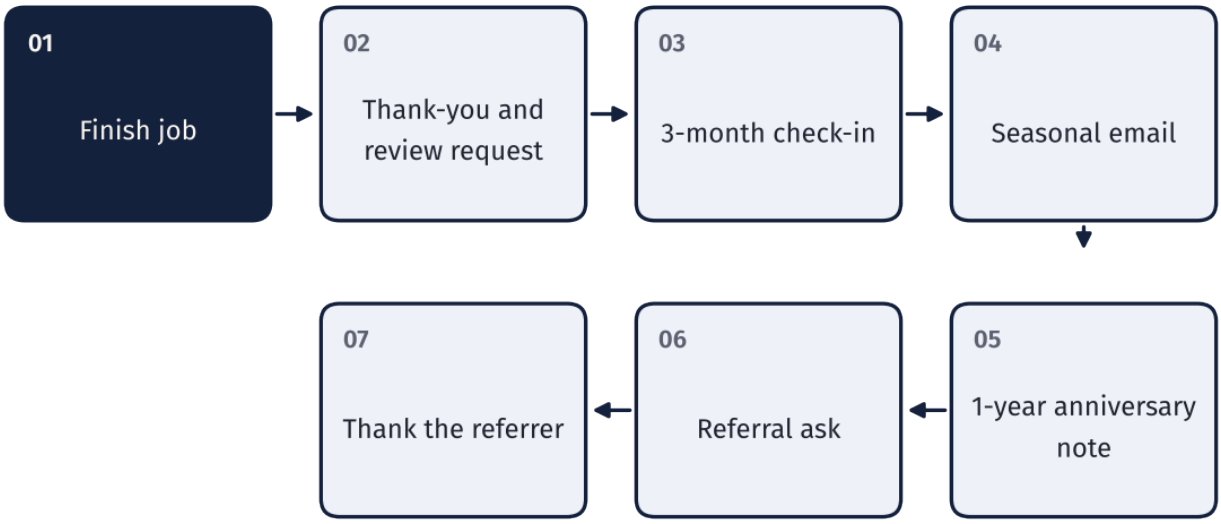
Every job site is a marketing opportunity. A clean site, a branded vehicle, polite crews and a courteous note to neighbors make a strong impression. When the project is done, ask your client if you can leave a few cards or a note for curious neighbors.

- Clean, respectful job sites
- Branded vehicle or yard sign where allowed
- Neighbor notes at the start and end of a job

SECTION 15

The big picture: your best leads already know you

Past clients and partners are the warmest leads you will ever get. They already trust you, and the people they refer arrive half-sold. A simple follow-up system keeps that trust working for you.



A year of light-touch follow-up for every client.

SECTION 16

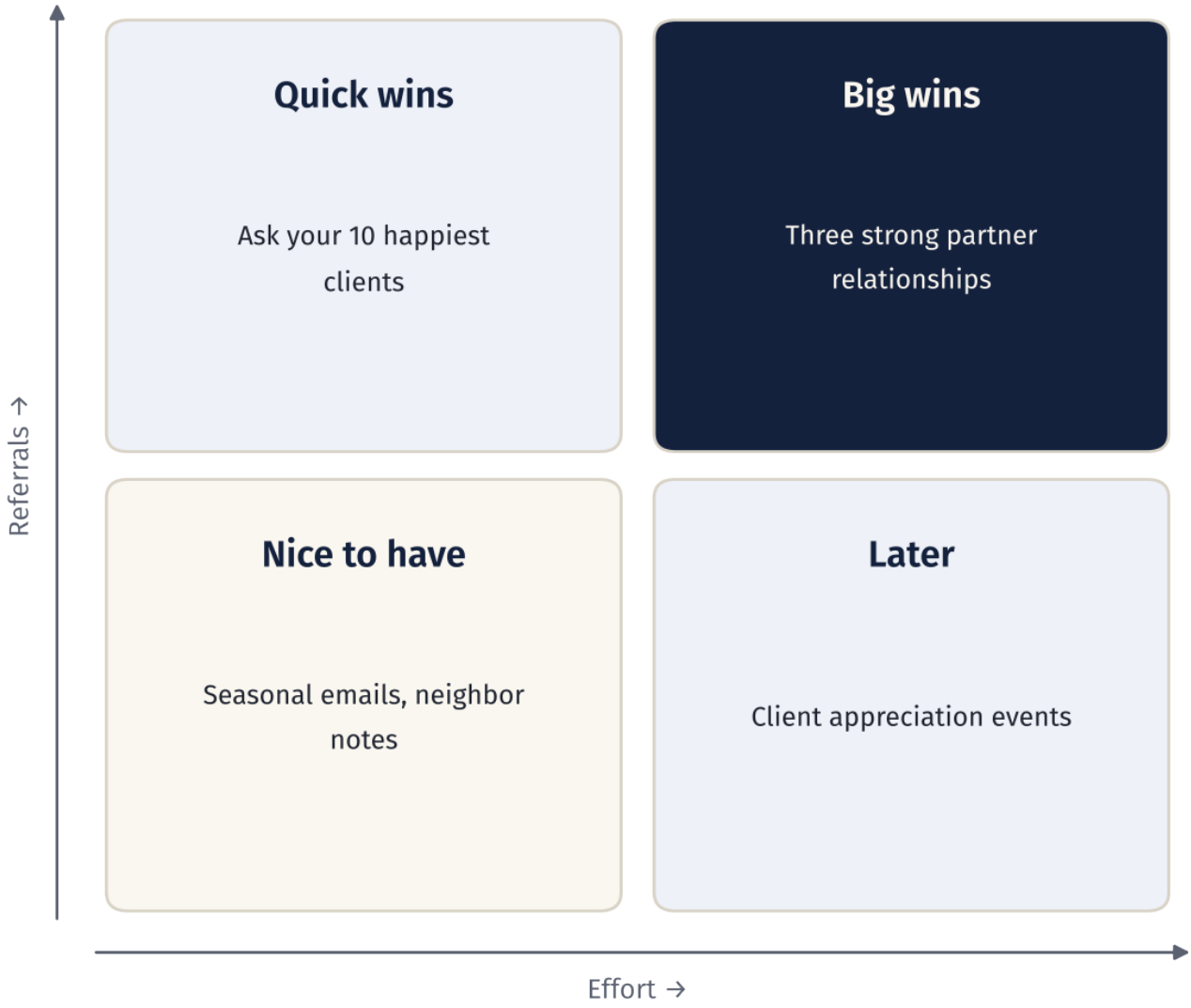
Where referrals come from



Four sources of referrals. Work on all four.

SECTION 17

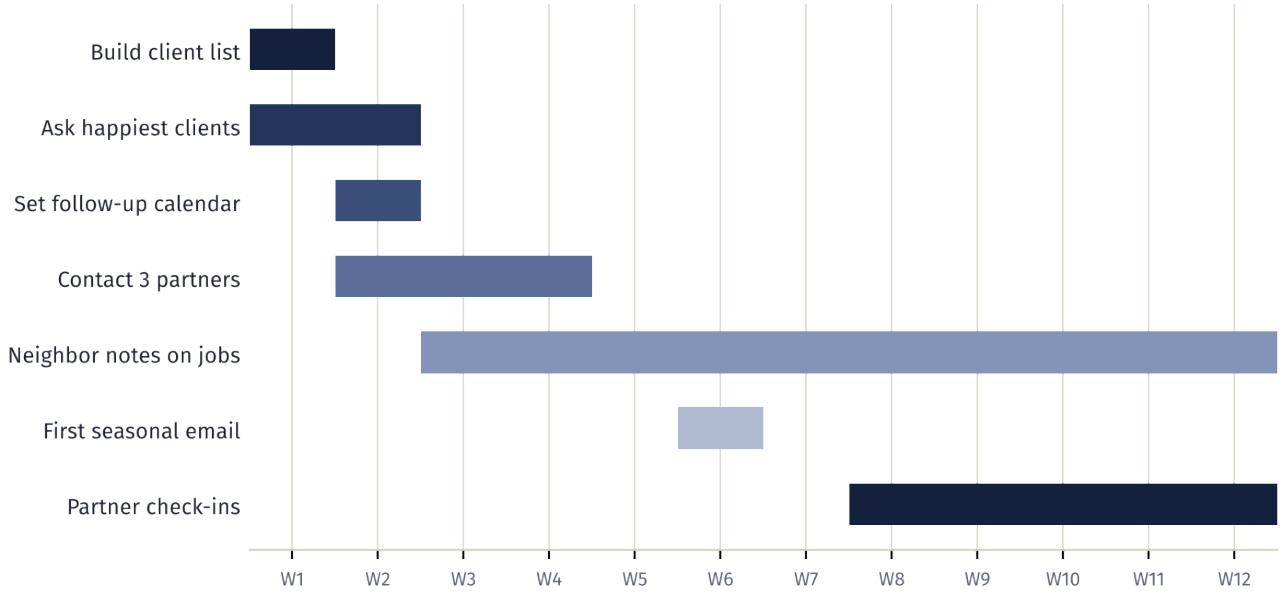
Where to spend your time first



Start with the people who already love your work.

SECTION 18

Your 12-week referral timeline



Three months to a steady referral system. W = week.

SECTION 19

Real-world scenario: turning past clients into a pipeline (illustrative)

This is an illustrative example. Ben has finished more than a hundred projects but never contacts clients after the final invoice.

He builds a simple list, sends a personal message to his twenty happiest clients, and sets reminders for three-month and one-year check-ins. He introduces himself to two interior designers and a tile showroom, bringing photos of recent work.

Over the next season, several new projects come from past clients, their neighbors and one of the designers.

The lesson: the trust was already there. Ben just started staying in touch.

SECTION 20

Troubleshooting: referral problems

Clients say they'll refer but don't	Make it easy with a short message they can forward and thank them warmly when they do.
Partners don't send work	Keep them updated on referred clients and refer work back when you can.
Follow-ups feel salesy	Lead with something useful, like a care tip, before asking for anything.

PART 3

Tools you can use today

Examples, templates, worksheets, calendars and trackers.

SECTION 22

Worked example: 3-month check-in

EXAMPLE

Hi [Name], it's been three months since we finished your [project]. How is everything holding up? Quick tip: reseal natural stone once a year to keep it looking new. Let us know if you need anything.

SECTION 23

Worked example: partner introduction

EXAMPLE

Hi [Designer name], I'm [Your name] with [Company]. We specialize in high-end tile and bathroom work in [area]. I'd love to show you a few recent projects and see if we could be a good fit for your clients. Coffee next week?

SECTION 24

Worksheet: your referral system

Your 10 happiest past clients

Three partners to contact this month

Your thank-you gesture for referrals

Date for your seasonal email

SECTION 25

Common mistakes to avoid

- Only reaching out when you need work
- Generic newsletters full of promotions
- Forgetting to thank people who send referrals

SECTION 26

FAQ

Should I pay for referrals?

Check your state's rules first. Many contractors send a thank-you card or small gift instead of cash.

How often is too often?

Four to six touches a year is plenty for past clients.

30-DAY ACTION CALENDAR

30 days to more referrals

Do one task a day. Tick the box in your head, or print this page and cross off each day as you go.

DAY 1 Export client list	**DAY 2** Mark happiest clients	**DAY 3** Write referral message	**DAY 4** Ask client 1-2	**DAY 5** Ask client 3-4
DAY 6 Ask client 5-6	**DAY 7** Ask client 7-8	**DAY 8** Ask client 9-10	**DAY 9** List partner types	**DAY 10** Pick 3 partners
DAY 11 Write partner intro	**DAY 12** Contact partner 1	**DAY 13** Contact partner 2	**DAY 14** Contact partner 3	**DAY 15** Prepare project photos
DAY 16 Meet a partner	**DAY 17** Write neighbor note	**DAY 18** Use note on a job	**DAY 19** Set 3-month reminders	**DAY 20** Set 1-year reminders
DAY 21 Write seasonal email	**DAY 22** Send seasonal email	**DAY 23** Thank any referrers	**DAY 24** Follow up partners	**DAY 25** Ask new clients
DAY 26 Update client list	**DAY 27** Review results	**DAY 28** Meet another partner	**DAY 29** Thank partners	**DAY 30** Plan next month

SECTION 28

copy-ready templates

TEMPLATE · COPY AND CUSTOMIZE

Referral ask

Hi [Name], we hope you're still loving your [project]. If you know anyone planning a remodel, we'd be grateful for an introduction. We'll take great care of them.

TEMPLATE · COPY AND CUSTOMIZE

Thank you for the referral

[Name], thank you so much for referring [Friend]. It means a lot to our small team. [Optional: a small thank-you is on its way.]

TEMPLATE · COPY AND CUSTOMIZE

Neighbor note

Hi neighbor! We're [Company], working on a [project] at [street] for the next [weeks]. We'll keep the street tidy and noise reasonable. Questions? Call [phone].

TRACKER

Referral tracker

Date	Referred by	New client	Project	Thanked?

SECTION 30

glossary

Referral partner	A business that sends you clients, often in exchange for referrals back.
Touchpoint	Any contact with a past client, like an email or call.

SECTION 31

Recommended tools

Every tool recommended in this playbook, in one place. Some links may be affiliate links; we only recommend tools we use or would set up for clients.

RECOMMENDED TOOL

Jobber

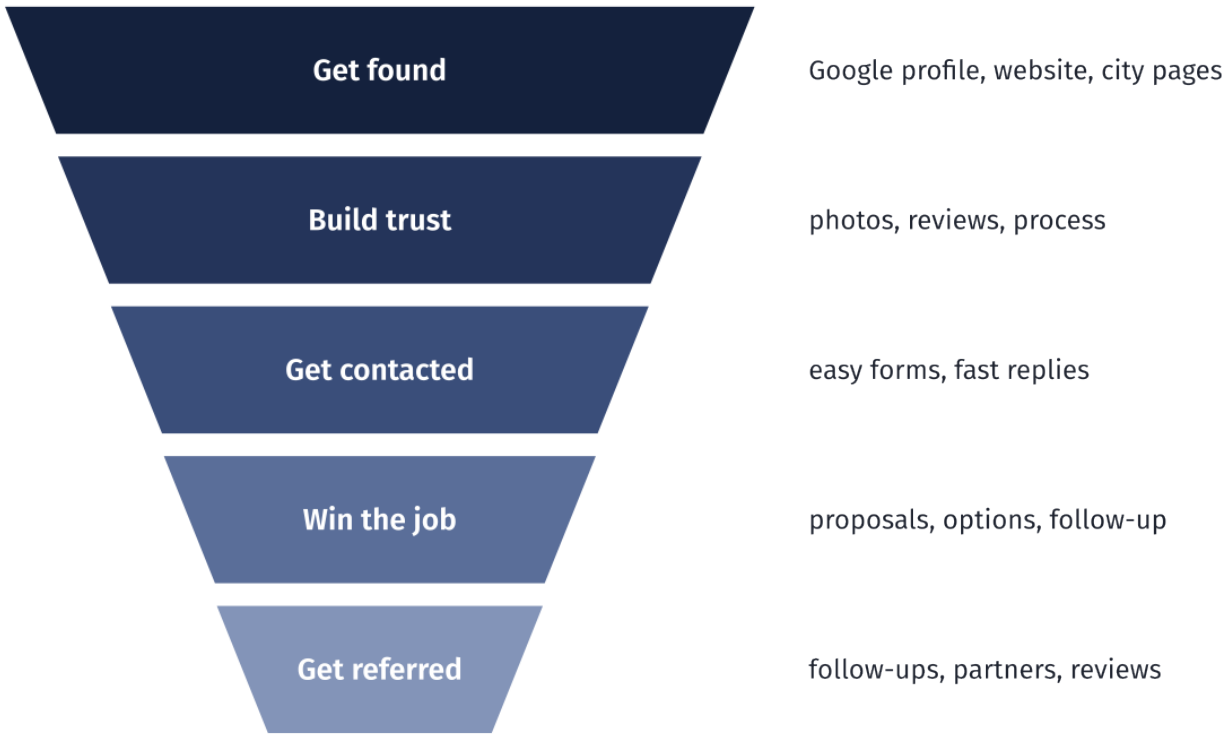
Stores your client list and history in one place.

Visit Jobber at getjobber.com →

SECTION 32

Bonus: the contractor marketing system on one page

Every playbook in this series fits into one simple system. Homeowners find you, trust you, contact you and refer others. Each part supports the next.



The five stages of contractor marketing and the tools for each.

SECTION 33

Bonus: your weekly marketing hour

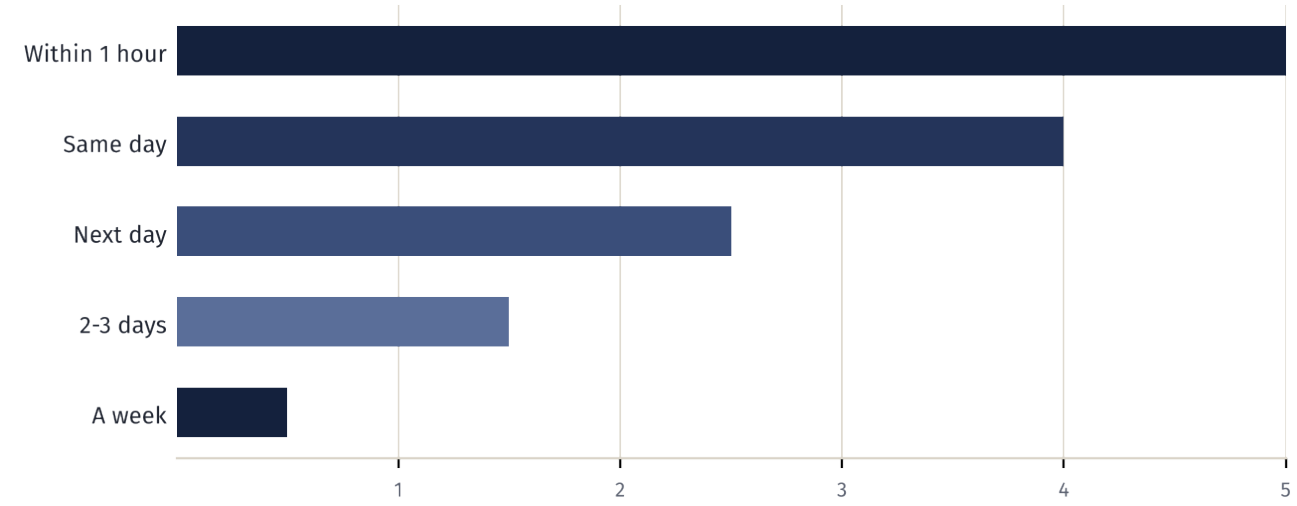
You don't need a marketing department. One focused hour a week, done consistently, beats occasional bursts of effort.

- First 15 minutes: answer every new lead and message
- Next 15 minutes: send review requests for finished jobs
- Next 15 minutes: upload new project photos to your website and Google
- Last 15 minutes: work on one improvement from your current playbook

SECTION 34

Bonus: how fast to reply to a lead

Homeowners often contact several contractors at once. The first professional reply makes a strong impression.



Our view of how reply speed affects your chances of winning the job, rated 1 to 5. Based on experience, not a study.

SECTION 35

Bonus: master checklist

- [ ] Website with a page for each main service
- [ ] Contact form on every page
- [ ] Google Business Profile complete and active
- [ ] Review request after every job
- [ ] Real project photos added monthly
- [ ] Pages for your top cities
- [ ] Job management software for quotes and payments
- [ ] Follow-up with past clients and partners
- [ ] One marketing hour every week

SECTION 36

Bonus: when to get help

Doing it yourself works if you have the time. If your calendar is full of jobs, it's often worth having a professional set up the foundation so you can focus on the work you do best. SmallBiz Marketing builds premium contractor websites and Google setups and can run your monthly marketing for you.

ABOUT SMALLBIZ MARKETING

SmallBiz Marketing builds premium websites and Google visibility for home-improvement contractors. Our team brings 20+ years of marketing experience, and every playbook is built from the same systems we use for client websites.

Rather have it done for you?

We build premium websites and Google setups for contractors, live in 5 days. Tell us about your business through the contact form at smallbizmarketing.net/contact.

Contact us →

Contractor website	$2,495
Website + Google setup	$3,495
Monthly growth plan	$995/mo

Some links in this playbook may be affiliate links. We only recommend tools we use or would set up for clients. Tool features and pricing change; check each company's site for current details.