



TECH READINESS WORKBOOK

ADAPT OR GET LEFT BEHIND:

How to Leverage AI & Tech to Future-Proof
Your Home Service Business

A background image of a city skyline at night, with a large, glowing red arrow superimposed over it. The arrow starts at the bottom left and trends upwards to the right, with a jagged line graph pattern following its path. The city lights and buildings are visible in the background, and the sky is a deep red color.

The future doesn't wait.

"AI & tech are transforming your market. The companies that embrace these tools now will dominate the next decade. This workbook is your first step — take action today."

— Joshua Cates, Founder & CEO Hero Marketing,
Author of *The Marketing Revolution* and *Built to Scale*.

TECH READINESS WORKBOOK



***ADAPT OR GET LEFT BEHIND:
HOW TO LEVERAGE AI & TECH TO FUTURE-PROOF YOUR
HOME SERVICE BUSINESS***

Welcome to the Hero Tech Readiness Workbook

The home service industry is changing fast — and AI is driving the transformation. Search visibility, marketing, customer engagement, sales, operations... every part of your business can now be enhanced (or disrupted) by smart technology. This workbook is your personal planning tool to help you take the insights from today's Masterclass and turn them into real actions that drive real growth.

Inside, you'll find:

- Easy-to-use self-assessments
- Lead generation & follow-up audit
- Tech Planning Framework

Remember: AI is not coming someday — it's already here. The businesses that embrace it today will win tomorrow.

Let's get to work.

— The Hero Marketing Team

SECTION 1: AI & TECH READINESS SELF-ASSESSMENT

MARKETING & ADVERTISING

Are you using AI-driven ad optimization?

Yes No

Are your Google PPC, LSA, and SEO strategies monitored and adapted weekly?

Yes No

Do you review dispatch board demand & revenue trends to align marketing spend?

Yes No

Score: Poor Fair Good Excellent

CUSTOMER ENGAGEMENT

Are you using automated text follow-up (Chiirp) to engage leads instantly?

Yes No

Do you send handwritten AI-powered notes (IgnitePOST) to nurture customers?

Yes No

Do you have an SMS + email nurture flow to capture and convert leads over time?

Yes No

Score: Poor Fair Good Excellent

E-COMMERCE & BOOKING

Can customers book services online (beyond a basic contact form)?

Yes No

Are you selling memberships, filters, or systems online (Contractor Commerce)?

Yes No

Are you offering transparent pricing and financing options on your website?

Yes No

Score: Poor Fair Good Excellent



SALES & LEAD MANAGEMENT

Do you track missed call return rate and follow-up speed?

Yes No

Are your leads segmented and nurtured based on buying stage?

Yes No

Is your CRM integrated with your marketing & booking systems?

Yes No

Score: Poor Fair Good Excellent

SEARCH VISIBILITY & SEO READINESS

Is your website NLP compliant and structured for AI search engines?

Yes No

Are you monitoring AI crawler activity on your website?

Yes No

Is your content strategy aligned with AI Overview and Google's evolving algorithm?

Yes No

Are service pages updated with local, helpful, AI-friendly content?

Yes No

Score: Poor Fair Good Excellent

SECTION 2: LEAD GENERATION & FOLLOW-UP AUDIT

MARKETING & ADVERTISING

Monthly Ad Spend: \$

Average Cost Per Lead: \$

Average Cost Per Booked Job: \$

Average Time to Follow Up: minutes

Follow-Up System in Place: Yes No

Missed Call Return Rate:

Top Performing Channel:

Lowest Performing Channel:

Notes & Observations:

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Score: Poor Fair Good Excellent



SECTION 3: TECH & AI PLANNING

Top 3 Tech Investments to Explore This Year:

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What Do I Need to Support AI Changes & Growth:

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Top 3 Tech Investments to Explore in 2026:

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Talent Needs to Support Growth:

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FINAL REFLECTION & ACTION PLAN

Top 3 Actions to Implement in the Next 30 Days:

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Biggest Insight From This Exercise:

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Accountability Partner or Follow-Up Date:

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