SERVICE BUSINESS ROADMAP

Service Business Setup Checklist

Use this checklist with the full Build Your Service Business System roadmap. Complete the foundation first, then add only the features required by your customer journey.

Full roadmap:
https://allinonedigitalmarketingplatform.com/build-your-service-business-system

1. Plan the Foundation

Define the business

- [ ] Write down the service the business will provide.
- [ ] Identify the type of customer the business will serve.
- [ ] Describe the customer problem the service solves.
- [ ] Define the geographic service area, if applicable.
- [ ] Choose hourly, project, flat-rate, recurring, or another pricing method.

Gather the starting information

- [ ] Business name and contact information
- [ ] Logo, brand colors, and authorized images
- [ ] Service descriptions and pricing information
- [ ] Business hours, address, or service area
- [ ] Genuine reviews, qualifications, or trust information
- [ ] Privacy policy and other required policies

Choose one primary customer action

Request a Quote

Collect project details before providing a price.

- [ ] Use this as the primary customer action

Book an Appointment

Let customers choose an available time or service.

- [ ] Use this as the primary customer action

Purchase a Service

Accept payment for a clearly priced offer.

- [ ] Use this as the primary customer action

Call the Business

Make a phone conversation the main next step.

- [ ] Use this as the primary customer action

BUILD THE SYSTEM

2. Build the Foundation

Work from the account settings outward. A complete customer journey matters more than adding every available feature.

Account and template

- [ ] Create the BizStackPro account and complete official member onboarding.
- [ ] Confirm the business profile, contact information, currency, and time zone.
- [ ] Open the template library and choose the closest functional starting point.
- [ ] Choose the template for its structure and customer journey, not its colors or images.

Website

- [ ] Customize the business name, logo, colors, images, and contact information.
- [ ] Write a clear hero section with one primary customer action.
- [ ] Add services, trust information, process, reviews, and frequently asked questions.
- [ ] Repeat the primary quote, booking, purchase, or call action where appropriate.
- [ ] Add the footer, contact information, and required policy links.

Lead capture and organization

- [ ] Create the quote, contact, or inquiry form.
- [ ] Collect only the information genuinely needed to respond.
- [ ] Add the form or calendar to the correct website section.
- [ ] Confirm that submissions create or update contact records.
- [ ] Create a simple pipeline when potential customers need several follow-up stages.

Initial follow-up

- [ ] Send a clear confirmation after a form or booking is submitted.
- [ ] Notify the business about the new lead or appointment.
- [ ] Create or update the appropriate opportunity when needed.
- [ ] Add one realistic follow-up message before building a larger automation sequence.

Add only what the customer journey requires

Quote path	Form + contact + pipeline + notification + follow-up
Booking path	Calendar + availability + confirmation + reminders
Payment path	Payment connection + offer + checkout + receipt + test
Phone path	Business number + click-to-call + routing + missed-call process

TEST AND PUBLISH

3. Complete the Customer Journey

Test the system like a prospective customer. Do not send traffic until the important actions work from beginning to end.

Website and customer actions

- [ ] Check the website on desktop and mobile devices.
- [ ] Open every important button, contact link, and policy link.
- [ ] Submit each form using realistic test information.
- [ ] Book, reschedule, and cancel a test appointment when applicable.
- [ ] Complete a test payment when online payments are enabled.

Records, notifications, and automation

- [ ] Confirm that the test person appears in the contact records.
- [ ] Confirm that the opportunity enters the correct pipeline stage.
- [ ] Check that the business receives the intended notification.
- [ ] Check that the customer receives the correct confirmation.
- [ ] Review workflow history and correct any failed actions.

Domain and publication

- [ ] Review spelling, pricing, business details, and policies.
- [ ] Connect the domain to the website.
- [ ] Repeat the complete test using the live domain.
- [ ] Publish and begin directing appropriate visitors to the website.

Key Help Center Guides

Template Library >	**Build and Edit Forms >**	**Create and Edit Pipelines >**
Create and Use Workflows >	**Calendar Setup 101 >**	**Connect the Domain >**