Job Close Out

Close out jobs the easy way and grow through customer referrals.

Scenario

When you first started your business, you would grab the last check, say thanks, and never hear from a previous customer again. It's no wonder why you almost never received referrals.

Now that you have created a job close out process using JobNimbus automations, almost a third of your business comes from customer referrals, your google rating is 4.9, and you're hiring a new crew for all the extra work.

Setup

In the "Automation" tab within settings:

1. Click "+ Add rule" and create a name.

2. Select "Event based" as the trigger type.

3. Select "When a Contact is Modified"

4. Click "+Add Condition" and select "If Status is equal to Job Close Out".

5. Click "+ Add action" and select Send Email, selecting your "Thank You + Review" template, and send to "All Related Contacts".

6. Add actions to create tasks for Schedule Final Walkaround, Dumpster Removal, and Pay Subcontractors. Assign to correct team members.

This automation can include a large variety of actions that support your close out process.

Add Automation Rule	✕

Rule Name: Job Close Out

Trigger type: Event based ▼

When a: Contact ▼ is Modified ▼

Conditions   **+ Add condition**

If **Status** is equal to **Job Close Out** (modified)   ...

◉ Require all conditions to be true
◯ Require any condition to be true

Actions   **+ Add action**

Create Task: Schedule Final Walkaround   ...

Create Task: Dumpster Removal   ...

Create Task: Send Invoice   ...

Create Task: Pay Subcontractors   ...

Send Email: Thank You + Review   ...

Cancel   **+ Save**

Benefits

- Automatically show your customers appreciation and ask them for referrals.
- Boost your company rating by including instructions for leaving a review.
- Alert all team members that a Job is closing out and assign the appropriate tasks.
- This automation can be replicated in a time based automation that can be used to schedule annual inspections, ask for referrals after a longer time period, and maintain contact with previous customers.

JobNimbus