Your First Customer Action Plan

Choose one customer and one clear offer. A focused outreach plan is easier to follow than trying to reach everyone.

Put it into practice

1. Define who needs your service, the area you cover, and what is included.

2. List five appropriate contacts or local places where your customer looks for help. Follow community posting rules.

3. Set an outreach date, a polite follow-up date, and a way to record replies. Stop if someone declines.

Starter example

Introduce your offer: I provide [service] for [customer] in [area]. It includes [scope]. If useful, I can explain the process and provide a quote after [assessment].

Your next action

My customer / offer / first channel / next action

Measure replies and enquiries, then improve clarity. Activity is not a guarantee of bookings.

Continue with the practical decision guide and worksheet on the next pages.

Build an outreach process you can repeat

Work through the decision

Begin with a customer problem you can describe in one sentence. A new cleaner might focus on busy households wanting a regular maintenance clean; a detailer might focus on vehicle owners who value a convenient basic package. Choose one offer and one area for the first test. A narrow starting point makes it easier to understand why people enquire or decline.

Create a short list of appropriate opportunities: people who have asked about your service, community spaces that allow business introductions, or local partners whose customers may need your work. Record the channel and reason the offer is relevant. Avoid buying a large contact list or sending the same message everywhere. Spend the first week learning which questions customers ask.

A situation to learn from

Example: you share a permitted post explaining your service and receive three enquiries. Two are outside your area; the third wants a task you excluded. The lesson is not automatically to lower the price. Clarify your area and scope in the next post. Record enquiries, quotes, bookings, and reasons for declining separately so you can see where the process loses people.

How to respond

If there are no enquiries, test the visibility and clarity of the offer. If enquiries do not become quotes, review the information requested and response time. If quotes do not become bookings, ask politely whether timing, scope, or another factor mattered. Make one change at a time; a small sample is a clue, not proof.

Outreach tracker

Use this page with your own service and circumstances. Record assumptions separately from confirmed facts, and update the plan using actual work.

Date / channel / why this customer fits

Message or offer shared / enquiry received

Scope requested / quote sent / follow-up date

Result / reason declined / next improvement

Review before taking the next step

Weekly review: What question came up most often? Which enquiry matched my offer? What one sentence should I change before the next outreach attempt?

- [ ] Offer states customer, scope, area, and next step.
- [ ] Contact method works on a phone.
- [ ] Follow-up is relevant, optional, and stops after a decline.
- [ ] Only confirmed bookings enter the work schedule.

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