

THE SETUP CHECKLIST

What a complete local presence actually looks like

Five parts, and they are not five projects. They are five components of one system, and the value is almost entirely in the connections between them.

There was a time when a good crew, solid referrals and answering the phone fastest won the job. That time is gone. Before anybody calls you they have already searched you, read your reviews, looked at your site and decided, usually in under a minute. If there is nothing to find, they do not call. They call whoever built theirs.

Most service businesses treat these as five separate problems needing five separate tools. They end up with a site on one platform, a Google profile nobody checks, a Facebook page disconnected from anything, and leads sitting in a text thread. Nothing talks to anything else. Nothing works while they sleep. That is not a marketing strategy, it is five half-built things that together produce inconsistent results.

Some of this you can do yourself in an afternoon. Some of it takes real time to set up properly. A few parts are yours no matter who you hire, and those are marked. Work down the list, tick what is done, and what is left is your actual to-do list rather than a guess.

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Everything here is explained in plain words, at length and for free, at wellrun.works/guide. Nothing on this document is behind a form.

01

Physical presence and brand kit

Your digital presence gets people to call. Your physical presence gets them to trust you before they ever search. A card handed to a neighbor, a sign on a finished job, a decal driving through a neighborhood: these compound, but only if they look like they came from the same company. And every physical surface with a QR code on it becomes a direct bridge back to your digital presence, which turns a yard sign into a lead.

Build the brand kit first

Without one, every flyer and card starts from scratch, guessing at colors or paying somebody to decide again. With one, any designer, printer or tool produces on-brand material in minutes. Build it once, use it forever.

- ☐ Logo in three formats: primary, stacked, and icon only
A full logo rarely fits everywhere you need it. The icon is for favicons, profile photos and embroidery.
- ☐ Color palette with exact HEX, RGB and CMYK codes
Without exact codes your colors will differ on every printed piece and every screen.
- ☐ Two typefaces, one for headlines and one for body, available for print and web
- ☐ Vector files (SVG for web, PDF or EPS for print), not just a picture
Vector scales to any size without going soft, which is what a sign shop, an embroiderer and a vehicle wrapper will all ask for. A PNG or JPEG cannot be converted into one automatically: somebody has to redraw it. If your logo came out of a generator, get the redraw done before you order anything printed.
- ☐ A transparent version of every logo file
This is the most commonly missing piece. Without it the logo sits on any colored background inside a white rectangle, which is what makes a brand look stuck on rather than designed.
- ☐ Everything stored somewhere a printer or designer can be pointed at without asking you

Cards, signs and vehicles

- ☐ Business cards, 16pt stock or heavier, matte or soft touch rather than gloss
Order 500 to 1,000 to keep the per-card cost sensible. Gloss shows fingerprints.
- ☐ A QR code on the back, pointed at whichever destination converts best
Your profile, your quote request page, or your review link. Label it so people know what it does. Use a short link so you can count the scans.
- ☐ Yard signs at every active job, 18x24 or 24x18 corrugated
Typically three to eight dollars each in bulk. One good job in a tight street generates calls from everybody who watched the work happen. Ask to leave it up a week or two after you finish, right after a good job, and most people say yes.
- ☐ Door hangers in the streets where you have just finished work
More targeted than flyers because of proximity and timing. We just finished a job two doors down, if you have been thinking about it, here is a free estimate.
- ☐ Vehicle decals or a partial wrap on every work vehicle
A parked van at a supply store or on a job site is passive advertising you have already paid for. Full wraps are expensive; a clean partial decal is the low-cost entry.
- ☐ Branded shirts for you and the crew, which also show up in every before and after photo

- ☐ Every physical piece carries the same four things: logo, phone, website, QR code
The QR code is the bridge. It is what turns a physical touchpoint into a tracked lead.

02

The website

Your site has to do three things: be findable in search, convince somebody you are the right choice, and make contacting you effortless. A generic five page site with a contact form does none of them at scale. But the answer is not a hundred pages either. It is a real page for each service you actually sell and each area you genuinely work, written properly, which is a very different instruction from generating combinations.

Technical foundation

- ☐ Loads in under three seconds on a phone
Check it free with Google PageSpeed Insights. Speed is a direct ranking factor.
- ☐ HTTPS active, so browsers do not flag the site as not secure
- ☐ Mobile first, because most local searches happen on a phone
- ☐ Google Analytics installed, with the events that matter configured
Visits alone tell you nothing. Calls, form sends and bookings are what you need counted.
- ☐ Google Search Console verified
Free, and the only place that shows what people actually typed to find you, which pages Google will not show, and anything broken enough to drop you out of results.
- ☐ Conversion tracking on calls, forms and bookings
This is what turns an opinion about marketing into a number.
- ☐ UTM parameters on every external link pointing at your site
Your profile link, social bios, ad links. Plus a hidden field on your forms that captures the source. Without this you know you got ten leads and nothing about where from.
- ☐ LocalBusiness and Service schema, so search engines are not guessing what you do

The pages to build

Build what you can genuinely write. A page that exists because somebody multiplied services by towns reads like it, and since March 2024 Google treats mass-produced pages as a problem with the whole site rather than with those pages. Fewer real pages beats more thin ones, and that is now a safety rule rather than a style preference.

- ☐ Home page leading with what you do, where, and one clear next step
Not a photo gallery and not a company history.
- ☐ About page with the owner on it, because people hire people
- ☐ Contact or estimate page, easy to reach from every other page
- ☐ Reviews page aggregating your Google reviews
- ☐ Portfolio of real photos of real projects, before and after where you have them
- ☐ One page per service you actually sell
What it is, why people need it, how you do it, photos, FAQs, and a clear way to get in touch. No service is too small to have its own page, but only build the ones you genuinely offer.

- ☐ One page per area you genuinely work

Written with real local context: landmarks, neighborhoods, how the work differs there. If you cannot write something true and specific about an area, that page should not exist.

- ☐ Write about the questions customers actually ask, at whatever pace you can sustain

What does this cost, how often should it be done, what are the signs you need it. Once a month that is genuinely useful beats weekly filler, and filler now carries real risk.

On every page

- ☐ A unique title tag and meta description, written for a person not a robot
- ☐ A clean URL that says what the page is
- ☐ Phone number in the header and footer, tappable on mobile
- ☐ At least one obvious next step: call, or get a free estimate
- ☐ Images compressed, named properly, with alt text
- ☐ Service pages and area pages linking to each other, both directions
- ☐ A sitemap submitted to Search Console

03

Google Business Profile

The three businesses shown with a map at the top of local results take the large majority of local clicks, and fourth place is a long way down. This profile is the single highest-return free thing you own, and most businesses set it up once, never touch it again, and wonder why the phone does not ring.

Setup and verification

- ☐ Claim and verify the profile
Google verifies by posting a card to your address or by video, and it has to be you holding the phone. Nobody can do this on your behalf, and anybody charging you for it is charging for work they cannot do.
[ONLY YOU CAN DO THIS](#)
- ☐ Decide between a service area listing and an address listing
Address-verified listings rank noticeably better. Even working from home, verifying with your home address and then hiding it is usually the stronger move.
- ☐ Business name exactly as registered, with no keywords stuffed into it
Google suspends listings for this.
- ☐ Primary category set as specifically as possible, matched to your highest-volume service
- ☐ Every relevant secondary category added, treated like a keyword list

Fill it out completely

- ☐ Description leading with your primary service and city, ending with a next step
- ☐ Every service listed individually, each with its own description
- ☐ Hours correct, including holidays
- ☐ Website URL pointing at the right page, not just the homepage
- ☐ A local area code phone number rather than a toll free one
- ☐ At least ten real photos: vehicle, team, equipment, before and afters
Real photos outperform stock every time.
- ☐ Messaging enabled so prospects can text you from the profile
- ☐ Service area listing every city and zip you actually cover
- ☐ Attributes set: free estimates, licensed, insured

The part everybody skips

Setting the profile up perfectly and then going silent is like building a race car and leaving it in the garage. Google treats activity as a signal that the business is real and running. Half an hour a week is the whole commitment.

- ☐ Post an update weekly: a project photo, a tip, a before and after, a seasonal offer
- ☐ Upload two to four new project photos a week, taken on site
- ☐ Respond to every review within a day, good or bad
For a bad one, respond professionally, take it offline, offer to fix it. Never argue in public.

- ☐ Check suggested edits, because competitors and strangers can change your listing
- ☐ Read your insights monthly: views, searches, direction requests, calls

Reviews

You will not rank in the map results on a handful of reviews. The businesses holding the top three positions in most markets are well into double or triple figures with a rating above 4.5. Reviews are also the single biggest thing that turns somebody reading into somebody calling. Happy customers do not post on their own; annoyed ones do. You need a process, not hope.

- ☐ Create a short review link and save it somewhere you can paste it in two seconds
- ☐ Text or email every customer after the job, every time
It was a pleasure working on your project, if you have a moment a Google review would mean a lot to us.
- ☐ Make it a crew habit: whoever closes the job sends the request the same day
- ☐ Keep asking forever, because how recent your reviews are matters as much as how many
- ☐ Never buy reviews and never ask only the happy ones
Google detects the pattern and suspensions are permanent.
- ☐ Review link in your email signature, on your invoices, and in your website footer

04

Social and paid readiness

For a local trade, social is not mainly a lead channel. It is a credibility check. Somebody finds you on Google, looks you up, and an active page with real photos of real work tells them you exist and you are busy. A dead page raises doubt and loses the job. Beyond that, these accounts are the infrastructure paid advertising needs, and that infrastructure has to exist before you spend a dollar.

The accounts

- ☐ Facebook business page, every field complete, username claimed
- ☐ Instagram business account, connected to the page
- ☐ Both managed through Meta Business Suite rather than separately
- ☐ A business ad account inside Business Suite, separate from any personal one
- ☐ Advertiser verification completed
It can take a day or two, so do it before you need to launch rather than after.
- ☐ Nextdoor business page, which is free and carries real weight for home services

What to post

Consistency beats polish. One post a week for a year beats five in a week and then nothing for two months. Your phone and twenty minutes per job is enough to start.

- ☐ Before and afters, which are the bread and butter for every trade
- ☐ Short process clips: the crew working, the job in progress
- ☐ Seasonal and timely work, tied to what is actually happening this month
- ☐ Straight answers to questions you get asked on every estimate
- ☐ Screenshots of good reviews, posted with the relevant job photo

Before you spend anything on ads

Ads make an existing system busier. They do not build one. Everything above and everything in section 05 comes first, because paid traffic pointed at a business that cannot answer or track is how three thousand dollars disappears with nothing to show and no way to work out why.

- ☐ Conversion tracking installed and verified as actually recording
- ☐ Meta pixel on the site, which takes ten minutes and is free
- ☐ Google Ads account created and advertiser verification completed
- ☐ Start with Google Search on high-intent terms, exact and phrase match only
Broad match burns budget on searches that were never going to become work.
- ☐ Look at Local Services Ads, where you pay per verified lead rather than per click
Often the cheapest paid leads in a trade, and routinely overlooked. They need a background check.
- ☐ Geographic radius set to where you will actually travel

☐ A library of creative built before launch, not after

Job photos, before and afters, short clips, team shots. The algorithm needs variety to learn from. Every job is a potential ad.

05

Leads in one place, worked properly

Most local service businesses lose more money to poor follow-up than to a lack of leads. The business that replies first usually wins the job, and most trades reply in hours because they are on a roof when the phone rings. That is a setup problem, not a discipline problem. Beyond speed, one system tells you where your work comes from and which sources produce the jobs worth having.

Pick one place and commit

Which system matters far less than being consistent about it. Switching later is painful, so choose for where you want to be in a year rather than where you are this week.

- ☐ Every enquiry from every source lands in one list with a status against it
- ☐ Whichever tool you pick, the test is the same
 - Can it capture a lead automatically, respond instantly, keep a pipeline, and tell you where each lead came from. If it cannot do those four, it is a contact list rather than a system.
- ☐ You own the account and the data in it, so leaving costs you nothing but the help

Capture and instant response

- ☐ Every form submission triggers an immediate automated text and email
 - Thanks for getting in touch, we have your request and will follow up shortly, call or text us on this number.
- ☐ The lead is created automatically with everything they submitted, with no retyping
- ☐ You get a notification the moment it arrives
- ☐ Missed-call text-back on your business number
 - Any call you cannot answer gets a text inside a minute. In the US this needs a registered business with an EIN, because the carriers require it. If the business is not registered, this is not available at any price from anyone, and an email-based alternative goes in its place.
- ☐ Every source connected: website forms, profile messages, ad leads, referrals

The follow-up sequence

Most leads are not dead, they are slow. A sequence keeps touching them until they are ready or until they actually say no.

- ☐ Day 0, immediately: automatic confirmation text and email
- ☐ Day 0, within five minutes: a real attempt to call, and a voicemail if there is no answer
- ☐ Day 1: automatic text checking in, offering a time this week
- ☐ Day 3: automatic email with recent projects nearby
- ☐ Day 7: automatic text making sure it did not fall through the cracks
- ☐ Day 14: a final email, no pressure, one click when they are ready
- ☐ After that, a monthly or seasonal check-in bucket, which converts more often than you would think

- ☐ Never delete a lead. Mark it lost and leave it in the sequence

A no in November is sometimes a yes in spring.

Know where the work comes from

This answers the only question that decides your budget: where do my best jobs actually come from. Without it you are spending on feel.

- ☐ Every lead tagged with its source: map pack, organic, ads, social, referral
- ☐ UTM parameters on every external link, so the source carries through automatically
- ☐ Conversion goals set up for form submissions, with the source attached
- ☐ Call tracking numbers per source, so you know which channel produced the call
Otherwise every phone lead is attributed to nothing at all.
- ☐ Review it monthly: leads per source, close rate per source, average job value per source
This is where the decisions get made. A source producing eight thousand dollars in closed work for nothing beats one producing twelve hundred for a hundred dollars a month, and until you measure it you cannot see which is which.
- ☐ Know your numbers: leads a month, how many become estimates, how many become jobs, average value

This is a lot. That is the point.

Building and maintaining all of this, the digital presence, the physical brand, the ad infrastructure, the follow-up, is a real job. Most owners do not have time for it on top of actually running the business. If you have read this and thought I know I need to do this but I do not know where to start or when I would find the time, that is exactly what we do.

WellRun works with service businesses across marketing, sales, operations and financials, and it usually starts with marketing, because none of the rest matters if the work is not coming in. We build the foundation this checklist describes, fit it to your market, and run it while you do the job.

If you want to know which of these you are actually missing, the grade checks what is public about your business, asks about the rest, and gives you the plan in the order it should be done, with a timeline and a range. About five minutes, free, and you keep the plan either way.

wellrun.works/grade