

Customer Journey Video Kit

This cheat sheet gives you simple video scripts and checklists so your service business can stand out at every step of the customer journey.

How to use video scripts: copy the script you need and paste it into a new document. Personalize the names and details, then hit record.

Recording doesn't need to be complicated. Just use your phone, keep it selfie-style, and talk like you're talking to a real customer. If you're walking through a quote or showing something on your screen, video messaging tools like [Loom](#) can make that easier.

The Four Core Customer Journey Videos

These four videos follow your customer from "new lead" to "paid invoice." Each one is tied to a key step, so you build trust, answer questions, and maintain momentum throughout.

1. New Lead Welcome Video

Use this video to greet new leads right away and keep them warm while your team gets in touch.

- **When to send:** Right after someone fills out a form or requests a quote
- **Video length:** ~20–30 seconds
- **Who records it:** Owner

Video Script:

Hey [Customer Name], this is [Your Name] with [Your Company Name]. I'm so happy you reached out to us for your [service (e.g., gutter cleaning service)].

Here's what happens next: my team is going to review the information and give you a call. If we can't reach you, we'll send a text and an email to follow up.

I want you to know you reached out to the right place. If you ever have any questions, you can contact me directly, and I'll make sure it gets taken care of.

2. Quote Explanation Video

Use this video to answer common questions and filter out bad-fit customers before they slow you down.

- **When to send:** As soon as you send the quote
- **Video length:** ~45–60 seconds
- **Who records it:** Sales rep

Video Script:

Hey [Customer Name], [Your Name] here with [Your Company Name]. I just sent you a quote for your [service (e.g., full gutter cleaning and repair)].

While you review it, here are a few common questions we usually get about our estimates:

- [FAQ 1 (e.g., how pricing works)]
- [FAQ 2 (e.g., what's included in the work)]
- [FAQ 3 (e.g., deposits or payment schedule)]

If you have any questions at all, just reply to this message, text us, or call, and we'll walk through it with you.

Detailed Quote Walkthrough Video

For bigger quotes (e.g., \$1,000–\$5,000+), record a screen-share video walking through the quote. This reduces confusion, speeds up decisions, and builds trust.

- **When to send:** As soon as you send the quote
- **Video Length:** Varies based on service
- **Who records it:** Sales rep or owner

Video Script:

Hey [Customer Name], it's [Your Name] with [Company Name]. I just sent you the quote and wanted to send a quick video explaining it.

[Share your screen and walk through the quote line by line]

- [First section (e.g., Here's what we're doing at your property)]
- [Second section (e.g., Here's how the pricing is broken down)]
- [Third section (e.g., Here are any options or add-ons)]
- [Fourth section (e.g., Here's the total and any notes about what could change)]

If you'd like to move forward, you can approve the quote. Or, reply to this message with any questions, and I'll get back to you as soon as I can.

3. "You Chose Us" Quote Approved Video

Use this video to celebrate their decision, explain "what's next," and keep their confidence high.

- **When to send:** Right after a customer approves your quote
- **Video length:** ~45-60 seconds
- **Who records it:** Sales rep, office manager, CSR, or owner

Video Script:

Hey [Customer Name], I just saw you approved your quote for [service (e.g., full gutter cleaning and repair)]. Thank you for choosing us! We're really excited to work with you.

Here's what happens next:

- [Step 1 (e.g., our team will order materials)]
- [Step 2 (e.g., we'll schedule your visit and confirm your date/time)]
- [Step 3 (e.g., who will contact them and when)]

If you have any questions or comments, just let us know.

Pro Tip: Rotate who appears in these videos so it's not always the owner. Let other team members record the ones that fit their role so customers feel supported by your whole team.

4. Invoice + Referral Thank-You Video

Use this video to wrap up the job, check for a [five-star experience](#), and [ask for referrals](#) in a natural way. Phil suggests offering a service credit to encourage [customer referrals](#).

- **When to send:** When the invoice goes out
- **Video length:** ~30-60 seconds
- **Who records it:** Owner or CSR

Video Script:

Hey [Customer Name], [Your Name] here from [Company Name]. I want to thank you so much for trusting us with your [service (e.g., gutter cleaning and repair)].

You'll see your invoice attached to this message. If anything about your experience was less than 5 stars, please let us know. We really do want you to be happy with your experience working with us.

One of the ways we grow as a local business is through referrals from great customers like you. In this [email/text], I've included a [amount (e.g., \$50)] voucher you can pass on to a friend, neighbor, or family member who might need [service (e.g., their gutters cleaned)]. All you have to do is forward this [email/text] to them.

It was great working with you and, as always, don't hesitate to reach out if you have any questions.

Pro Tip: You can add a link to your video(s) in your [Jobber communication workflows or automations](#). It'll be sent when a customer requests a quote, approves work, or receives an invoice—so they hear from you at the right moment.

Problem-Solving Videos For Social + Your Website

These are short videos that answer real customer questions and problems. Phil recommends this simple three-part framework when recording them:

1. **Hook (first 3-5 seconds):** Call out the [customer pain](#) or commonly asked questions
2. **Solve and teach, don't pitch (30-45 seconds):** Explain what's going on and how to fix it
3. **Agitate + Call to Action (10-15 seconds):** Remind them what happens if they ignore it and invite them to reach out

Video Script:

(Hook)

Here's why your [customer problem (e.g., gutters overflow every time it rains)].

(Solve)

If you're seeing [symptom (e.g., water pouring over the sides, stains down the side of your house)], it usually means [simple explanation (e.g., your gutters are clogged, and they need to be cleaned)].

What we recommend is [simple, honest suggestion (e.g., getting your gutters cleaned at least once or twice a year, depending on how many trees you have)].

(Agitate + Call to Action)

If you don't want [costly consequence (e.g., your gutters falling off or causing landscaping issues after your next big storm)], then send us a message or request a quote on our website.

Our team can [benefit (e.g., check everything and get your system flowing again)].

Pro Tip: If you record calls or use voice memos, you're already sitting on all the topics your customers care about. Drop a call transcript or a cleaned-up email/text thread into ChatGPT (or your LLM of choice) and ask it to list:

- The main problems the customer mentioned
- The exact phrases they used
- The questions they asked

Then ask it to turn those into short video scripts using Phil's framework. This keeps your content simple, real, and based on what customers actually say—not guesswork. From there, post your videos on your social channels or embed them on your [website](#).

Video Content Batching

This is Phil's system for avoiding content [burnout](#) and still producing enough video to stay top-of-mind. Get everything done in one focused hour, so content never takes over your week.

1-Hour Recording Checklist:

☐ **1. Collect real questions (10 minutes)**

Skim:

- Call logs, emails, texts, and job notes for 10–15 questions customers actually ask
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☐ **2. Turn each question into a hook (5 minutes)**

Example:

- **Question:** "Why do my gutters always overflow?"
 - **Hook:** "Here's why your gutters overflow every time it rains."
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☐ **3. Set up your phone (5 minutes)**

Reminder:

- Quiet spot, decent light, phone at eye level
 - Put your hooks on a sticky note under the camera
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☐ **4. Record 10–15 videos (20–30 minutes)**

Remember:

- One question = one video
- Use the Hook → Solve → Agitate + CTA structure
- Don't stop and restart—just keep talking. You can trim later

Post-Recording Checklist:

☐ 1. Clip and caption

Use a video editing or AI tool and:

- Trim each video to 30–60 seconds
 - Add captions
 - Export vertical for social
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☐ 2. Schedule them

Put your videos to work:

- Add a few into your CRM workflow where it makes sense
- Post ~2 per week on your main social channels
- Reuse strong videos in emails + on your website

Pro Tip: These checklists are built around problem-solving videos, but you can easily adapt them to record your four core customer-journey videos as well.