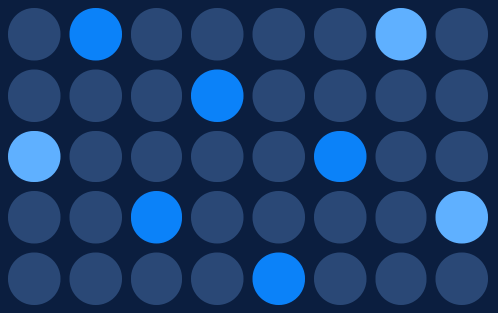
Service ProCall



FOR OWNERS OF HVAC, PLUMBING & ELECTRICAL COMPANIES

# Your Database Already Holds Your Next Stage of Growth



How to unlock dormant revenue from customers you already earned — without a single dollar of new ad spend.

9-minute read · The five-stage framework we use with clients

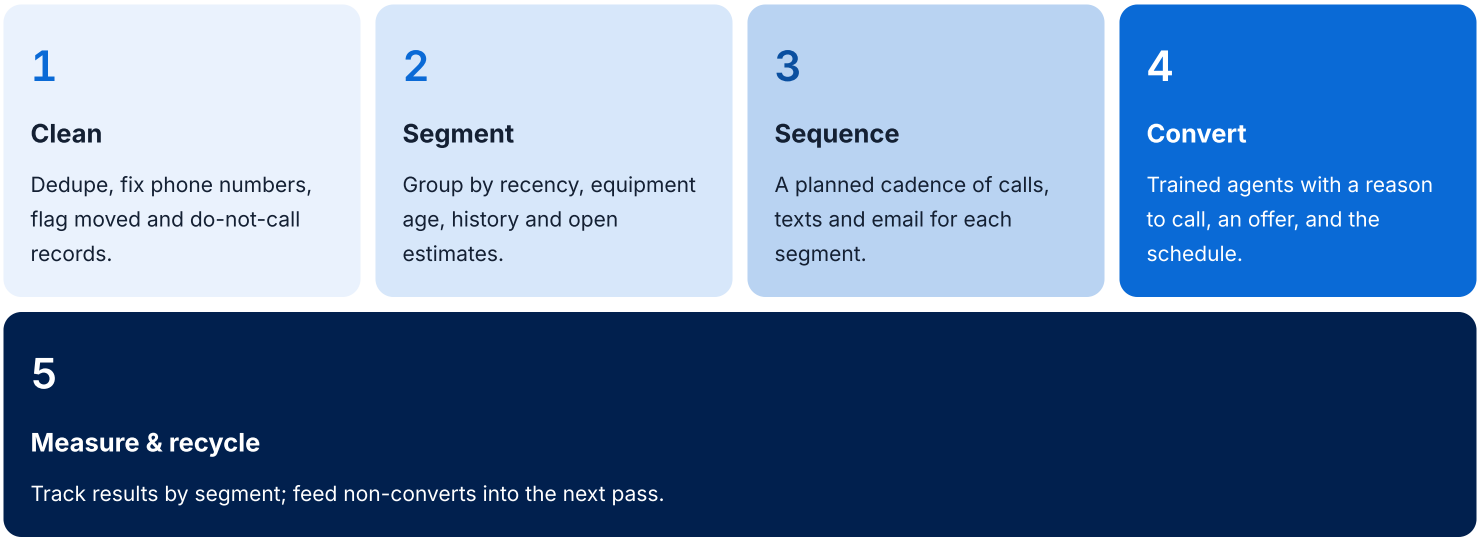
01 · WHY "EQUITY"

## Every past customer is equity you've already built

The term comes from the auto business, where dealers mine their service lanes and sales history for customers who are ready to trade up. Home services has the same opportunity, arguably a bigger one. You know what equipment is in each home, how old it is, what you recommended last time and whether the customer said "not yet."

The average home service business has three to five years of those records sitting idle. Equity mining is the discipline of working them on purpose: not a one-time blast during a slow week, but a repeatable system that finds the customers most likely to need you now, reaches them with the right reason to talk, and books the job. It is the cheapest growth lever you have, because the acquisition cost was paid years ago. (For the valuation math, see White Paper 03.)

FIGURE 1 · THE EQUITY MINING FRAMEWORK




The loop repeats every quarter, timed to the seasons that drive your trade.

02 · CLEAN AND SEGMENT

# Not every record deserves the same call

The biggest mistake in database outreach is treating the list as one list. A customer whose 16-year-old system you nursed through last summer needs a completely different conversation than someone you visited once for a clogged drain. Start by cleaning the data — wrong numbers and duplicates waste agent hours — then sort every record on two questions: **how recently did we serve them**, and **how much opportunity is likely sitting in that home**?

FIGURE 2 · THE SEGMENTATION MATRIX

OPPORTUNITY IN THE HOME →

PRIORITY 2

### Upgrade candidates

Recent customers with aging equipment or an open estimate. Warm relationship, real need.

PRIORITY 1

### Replacement-ready

Not served in 18+ months, equipment 10+ years old. Highest value, and most at risk of calling someone else.

PRIORITY 4

### Maintenance due

Recent, newer equipment. Book tune-ups and offer a membership.

PRIORITY 3

### Win-back

Lapsed one-time customers. Re-introduce, offer a check-up, rebuild the relationship.

TIME SINCE LAST VISIT →

### Open estimates

Every unsold quote is a homeowner who already agreed they had a problem. Work these first.

### Lapsed memberships

They chose you once and stopped renewing. Often the easiest yes in the database.

### Emergency-only customers

They found you in a crisis and never heard from you again. Turn them into planned customers.

03 · SEQUENCE

## One call is not a campaign

Past customers are busy and rarely answer an unfamiliar number the first time. A single attempt reaches a small fraction of the list. A planned cadence across calls, texts and email reaches far more of them — and each touch gives the next one context. Here is the shape of a 21-day sequence for a Priority 1 segment.

FIGURE 3 · A 21-DAY OUTREACH SEQUENCE



**Day 1** Call + text

**Day 2** Call, different time of day

**Day 4** Email with reason + offer

**Day 7** Call

**Day 10** Text

**Day 14** Call

**Day 21** Final call + email, then recycle in 90 days

A sample cadence. Respect each customer's contact preferences and applicable calling and texting rules (consent, quiet hours, do-not-call lists).

04 · CONVERT

# Lead with a reason, not a pitch

Calls that open with a sales offer get treated like spam. Calls that open with something specific to the customer's home get a conversation. The agent's job is to reconnect, give a real reason for the call, make a relevant offer, and book — in that order.

That only works if the agent can see the customer's history, has authority to book into the live schedule, and knows exactly when to hand a replacement conversation to your comfort advisor or estimator.

FIGURE 4 · THE FOUR-BEAT CONVERSATION

**RECONNECT** "Hi, this is Dana with Summit Heating & Air — we took care of your air conditioner back in 2022."

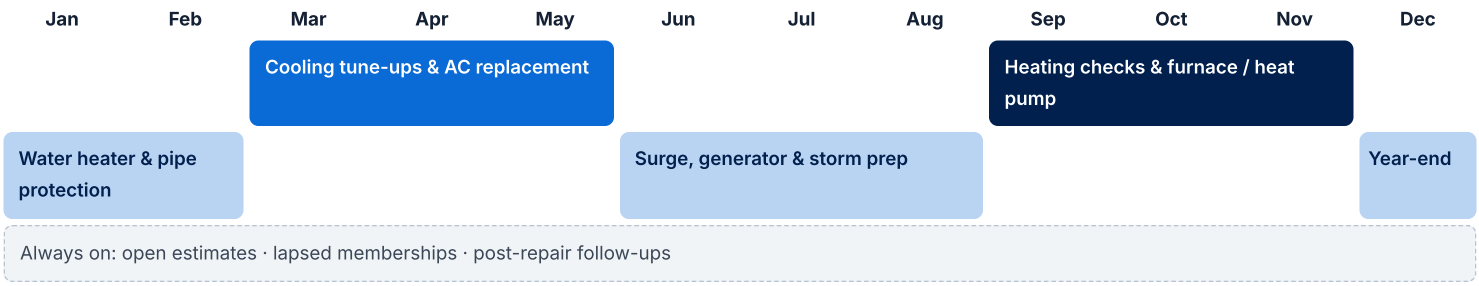
**REASON** "Our records show that system is about 14 years old, and we're reaching out before the heat sets in."

**OFFER** "We're doing a performance check for past customers this month — a full cooling tune-up for $79, and we'll check how much life that system has left while we're there."

**BOOK** "I have Thursday morning or Friday afternoon. Which works better?"

Sample wording for a fictional HVAC company. Swap in your own name and seasonal offer.

FIGURE 5 · TIME EACH PASS TO A SEASONAL REASON TO CALL




Adjust the calendar to your climate and trade mix.

05 · MEASURE AND RECYCLE

# Six numbers that tell you if it's working

COVERAGE

### Records worked

Share of each segment that completed the full sequence.

REACH

### Conversation rate

Live conversations ÷ records worked.

CONVERSION

### Booking rate

Booked jobs ÷ conversations, by segment.

PIPELINE

### Replacement opportunities

Estimates set from database calls, and their close rate.

RETENTION

### Memberships sold

New and reactivated agreements from each pass.

THE ONE THAT MATTERS

### Revenue per record worked

Total booked revenue ÷ records worked. Compare it to your cost per new lead.

Records that don’t convert aren’t failures — they move to the next quarter’s pass with a new seasonal reason to call. Over a year, each customer hears from you a handful of times with something relevant to say, which is exactly how a company stays the obvious choice when a system finally fails.

START THIS MONTH

## A first pass in four steps

1. Export all customers from the last five years with last-visit date, equipment age and open estimates.
2. Pull your Priority 1 segment: no visit in 18+ months and equipment 10+ years old.
3. Pick one seasonal reason to call and one offer. Write the four-beat conversation.
4. Work the segment for 21 days and track revenue per record worked.

SERVICE PROCALL · DATABASE MONETIZATION

## We run the whole loop for you.

Cleaning, segmenting, sequencing and calling your past customers — booked straight into your schedule, measured by revenue per record.

800-458-6211

serviceprocall.com

Sample cadences, scripts and calendars are starting points to adapt to your market. Outbound calling and texting must follow applicable consent and do-not-call rules. © Service ProCall.