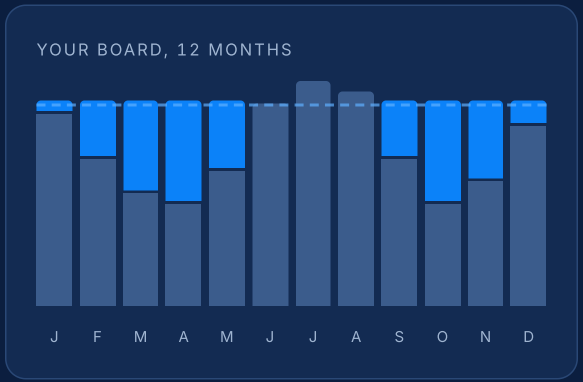
FOR OWNERS OF HVAC, PLUMBING & ELECTRICAL COMPANIES

The End of Shoulder Season

High-volume outreach plus a no-charge visit means your board never has to run slow again.

8-minute read · Includes a worked example for a 6-technician HVAC company



15–30%
of past customers reached book a no-charge visit

20–30%
of shown visits turn into a sold job on the spot

15–20%
of homeowners who don't buy call back within 90 days

01 · THE PROBLEM

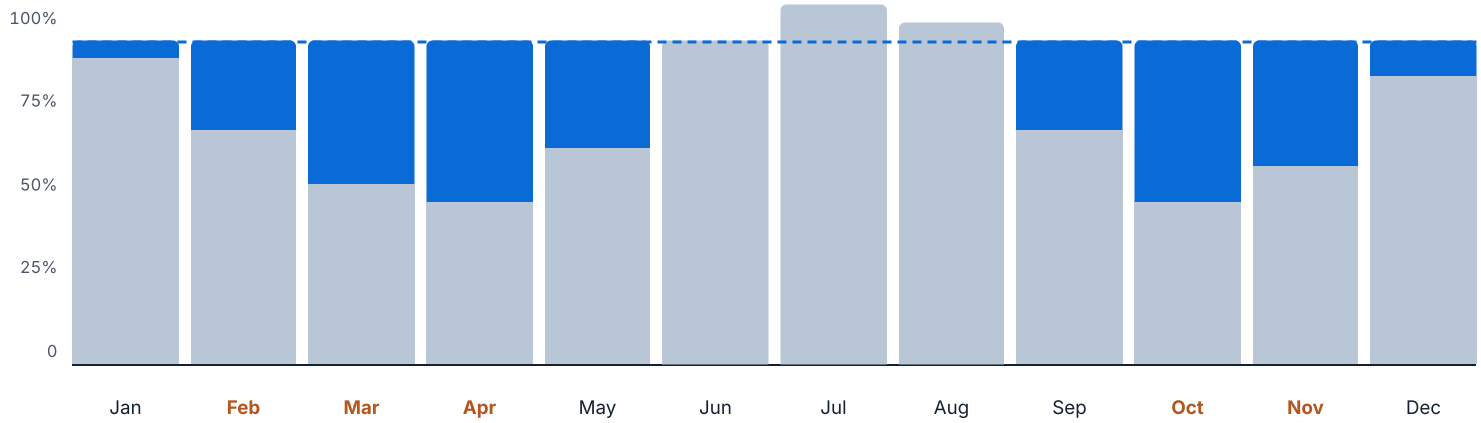
Every HVAC company knows the dip

Twice a year the weather turns mild and the phones go quiet. In the spring shoulder (roughly February through April) and the fall shoulder (October and November), homeowners aren't thinking about their furnace or their air conditioner, so the demand calls that fill your board in July and January slow to a trickle.

Your costs don't slow down with them. Technicians are on payroll, trucks are on lease, and the lights are on whether the board is full or half empty. Most owners respond the same three ways: cut hours, run discounts, or buy more ads. The first loses good technicians, the second trains customers to wait for a sale, and the third pays premium prices for leads in the months they convert worst.

There is a fourth option. Your customer list already holds thousands of homes with equipment you installed or serviced. The shoulder season is the best time of year to call them, because your technicians have the time to do the visit right.

FIGURE 1 · BOARD FILL BY MONTH, BEFORE AND AFTER A SHOULDER-SEASON PROGRAM



Filled by demand calls · Filled by no-charge visits from your customer list · Target: a 90% board every month

Bold months = shoulder season

Illustrative demand pattern for a mixed-climate HVAC company. Your own months will differ: pull last year's board fill by month to draw your version.

02 · THE FORMULA

High volume × a no-charge offer = no more slow season

Filling a soft board takes two things working together. Either one alone falls short. A great offer made to a few hundred people books a few dozen visits. A huge calling list with a paid offer gets a lot of polite no's. Put real volume behind an offer homeowners actually want, and the math changes.

FIGURE 2 · WHY IT TAKES BOTH

VOLUME

Thousands of conversations

Your full customer list, up to three contact passes per home, worked by a team sized every day to the open slots on your board.

×

THE OFFER

A no-charge visit

A complimentary safety check or maintenance inspection. No upfront ask, so far more homeowners say yes.

=

THE RESULT

A full board in the slow months

Technicians in homes every day, each visit a chance to sell repairs, replacements and maintenance plans.

03 · WHY THE OFFER WORKS

A free visit isn’t a giveaway. It’s the cheapest way into the home.

Owners sometimes balk at giving a visit away. But a technician on a no-charge inspection costs you the same as a technician sitting in the shop, and only one of them can sell anything.

The no-charge visit removes the only reason a happy past customer says no: being asked to spend money before anyone has looked at the system. Once your technician is in the home, they see the 14-year-old condenser, the cracked flue, the panel that’s out of capacity. Those findings become today’s repair, next month’s replacement, or a renewed maintenance plan.

And the homeowners who don’t buy that day aren’t lost. In our programs, an estimated 15–20% of them call back within 90 days when a real need comes up. They call you, because you were the last company in their home.

FIGURE 3 · FOUR REASONS IT PAYS

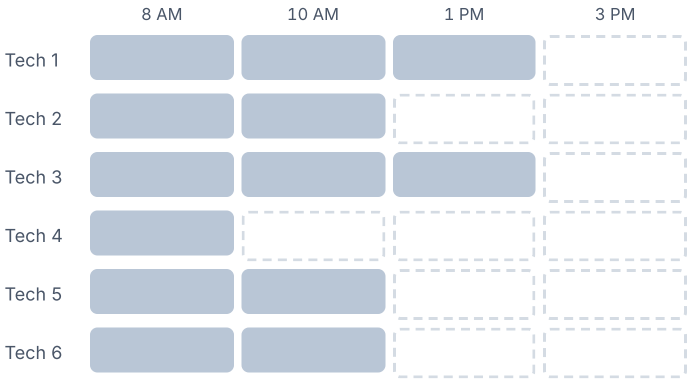
1. **Lowers the barrier.** No upfront cost means far more homeowners say yes, which drives a 15–30% booking rate off the database.
2. **Pays for itself on the first close.** One replacement sold covers the cost of every no-charge visit that day.
3. **Builds trust in the home.** A real inspection with written findings earns the right to recommend work.
4. **Creates a second wave.** Homeowners who don’t buy today call back later, at no added lead cost.

04 · WHAT IT LOOKS LIKE ON THE BOARD

One Tuesday in October

Take a 6-technician HVAC company that runs four visits per technician per day: 24 slots. On a typical shoulder-season Tuesday, demand calls fill about 13 of them. Without a program, the other 11 are trucks in the yard. With one, outreach to past customers adds about seven no-charge visits a day, clustered by zip code so technicians aren’t crossing town between them.

FIGURE 4A · WITHOUT A PROGRAM



13 of 24 slots filled 54%

FIGURE 4B · WITH A NO-CHARGE VISIT PROGRAM



20 of 24 slots filled 83%

Demand call · No-charge visit booked from your customer list · Open slot

Illustrative. Seven shown visits a day is about 150 a month across 21 working days, the low end of what a 3,000-record monthly program is estimated to produce.

05 · THE MATH FOR ONE MONTH

From 3,000 records to $105,000 or more in sold work

Here is the same 6-technician company over a full shoulder-season month, working 3,000 past-customer records with a no-charge inspection offer. The funnel uses the conservative end of our program benchmarks; your list, market and technicians will move every number.

FIGURE 5 · ONE SHOULDER-SEASON MONTH (ILLUSTRATIVE)

3,000	150–225	30–45	$105K–$158K	+$63K–$77K
past-customer records worked	no-charge visits that show	sold jobs from 150 shown (20–30% close)	Wave 1 revenue at a $3,500 average ticket	Wave 2: ~18–22 callbacks within 90 days

Shown-visit range from the Service ProCall rate card estimate (1,000 records ≈ 50–75 shown visits a month). Close, callback and ticket figures from our program benchmarks. Revenue figures use the 150-visit case. Illustrative, not a guarantee.

06 · WHAT IT COSTS

About $32–$42 per technician in the home

Programs are priced as a level monthly fee on your committed record volume, plus a success fee charged only on visits that actually show. No-shows cost you nothing. Compare that with paid leads, which commonly run $100 or more each and still have to be reached, booked and shown.

3,000 RECORDS A MONTH · 12-MONTH PLAN	150 SHOWN	225 SHOWN
Monthly base fee	$4,453	$4,453
Success fee ($12.50 per shown visit)	$1,875	$2,813
Total monthly investment	**$6,328**	**$7,266**
Cost per shown visit	$42.19	$32.29

Service ProCall rate card effective November 12, 2026. List prices, subject to change.
Shorter terms are available at a higher monthly rate.

The base fee stays level all year. What changes is how hard we dial: outreach steps up in the shoulder months to fill the open slots and steps back in July and January, when demand calls take over your board. You get a steady program and a full schedule without re-launching a campaign every spring and fall.

07 · HOW TO RUN IT

Five rules for a shoulder-season program

Start three weeks before the dip

Book the slow weeks before they arrive. A program that starts when the board is already empty spends its first two weeks catching up.

Match the offer to the season

Furnace safety inspections in the fall, cooling check-ups in the spring. The reason for the call should match what the homeowner is about to need.

Call the right homes first

Lead with aging equipment, lapsed maintenance plans and open estimates. They produce the most sold work per visit.

Make the visit worth having

A real multi-point inspection with written findings. Technicians recommend what they see, and offer a maintenance plan on every visit.

Book by zip code

Cluster no-charge visits around the demand calls already on the board, so technicians spend the day in homes, not in traffic.

FIGURE 6 · A FALL CALL, START TO FINISH

RECONNECT “Hi, this is Dana with Summit Heating & Air. We serviced your furnace back in 2023.”

REASON “Before the cold sets in, we’re reaching out to past customers whose systems are over 10 years old.”

OFFER “We’re offering a no-charge furnace safety inspection this month: burners, heat exchanger, carbon monoxide and airflow.”

BOOK “I have Tuesday morning or Thursday afternoon open. Which works better?”

Sample wording for a fictional HVAC company.

PLUMBING & ELECTRICAL

No shoulder season? Same play.

Plumbing and electrical demand is steadier through the year, but every board has soft weeks. Water heater checks on 10-year-old tanks and whole-home electrical safety inspections fill them the same way.

BEFORE YOUR NEXT SHOULDER SEASON

Four numbers to pull this week

1. Board fill by month for the last 12 months.
2. Open slots in your slowest four weeks.
3. Past customers with a valid phone number.
4. Your technicians’ close rate on maintenance visits.

SERVICE PROCALL · DATABASE MONETIZATION

Make this the last slow season.

We’ll show you how many open slots your customer list can fill before the next shoulder season starts.

800-458-6211

serviceprocall.com

SOURCES

1. Service ProCall, KPIs, SLAs & Performance Metrics, November 12, 2026: booking rate 15–30%, show rate 70–80%, technician close rate 20–30%, customer reengagement 15–20% within 90 days.

2. Service ProCall Client Price Sheet, rate card effective November 12, 2026.

3. Service ProCall, The Equity Mining Playbook: no-charge visit strategy and worked example.

Seasonal patterns, board examples and revenue figures are illustrative, not guarantees. © Service ProCall.