A PRACTICAL GUIDE

The HVAC Tune-Up Reminder Playbook

A step-by-step guide to seasonal campaigns and maintenance-plan setup

Made by the Braxis machine

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ABOUT THIS GUIDE

What this is

This guide is for small HVAC contractors.

It is a practical method, not a promise of a result. It contains no invented statistics, no fake customers, and no guarantees. The words were drafted with AI assistance.

Use the checklist at the end on a real piece of work this week.

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Define Your Seasonal Windows

Start by identifying your local HVAC seasons. Most contractors focus on spring and fall, but adjust based on your climate. Spring is for pre-summer prep, fall for pre-winter readiness. Use local weather patterns—if winters are harsh, emphasize fall tune-ups. If summers are extreme, prioritize spring. Set clear dates for campaigns, like the last week of March for spring and the first week of October for fall. This creates urgency and aligns with customer behavior. Avoid vague terms like ‘summer’ or ‘winter’—be specific. Example: ‘Spring Tune-Up Special: April 1–15.’ This precision helps customers plan and reduces last-minute inquiries.

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Craft the Reminder Message

Keep reminders short, benefit-driven, and action-oriented. Focus on outcomes like ‘saving 15% on cooling costs’ or ‘avoiding emergency repairs.’ Use plain language—avoid jargon. Include a clear call-to-action, such as ‘Book now’ or ‘Call today.’ Test two versions: one highlighting cost savings and another emphasizing comfort. Example: ‘Spring is here—don’t let your AC fail! Schedule a $99 tune-up before temperatures rise.’ Avoid overpromising; stick to verifiable benefits. Use email subject lines like ‘Your AC Checkup is Overdue’ or ‘Fall Tune-Up: Save Before It Gets Cold.’

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Choose Your Channels

Leverage email, SMS, and direct mail for maximum reach. Email works best for broad reminders, while SMS is ideal for urgency (e.g., ‘Your spring appointment is in 3 days—confirm now’). Direct mail adds credibility for older customers. Use your CRM to segment customers by last service date—target those due in the next 30 days first. Pair reminders with promotions, like a discount for booking within a week. Example: ‘Book by April 10 and get $20 off.’ Avoid spamming; space reminders 7–10 days apart. Track open rates and clicks to refine your approach.

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Set Up a Maintenance Plan

Offer annual or bi-annual plans with tiered pricing. Include a basic plan (tune-up + filter change) and a premium plan (full system inspection + duct cleaning). Use a simple contract with clear terms—include cancellation policies and payment schedules. Example: ‘$120/year for a spring/fall tune-up.’ Promote plans during peak seasons with a limited-time discount. Use a tool like QuickBooks or a dedicated HVAC software to automate renewals and reminders. Highlight the convenience of recurring service to reduce customer churn. Example: ‘No more guessing—we’ll call you before your next checkup.’

Measure and Optimize

Track key metrics like appointment bookings, cancellation rates, and revenue from reminders. Use a spreadsheet or CRM analytics to compare spring vs. fall performance. If fall tune-ups underperform, adjust messaging or timing. Example: If cancellations spike, offer flexible scheduling. If bookings are low, test a referral incentive (‘Get $30 off if you refer a friend’). Continuously refine your campaigns based on data. Example: If email open rates drop, improve subject lines. Focus on improving conversion rates, not just volume. Small tweaks—like shorter reminders or stronger CTAs—can yield big results.

USE THIS

Checklist

☐ Identify your local HVAC seasons and set clear campaign dates for spring and fall.
☐ Write two reminder message versions: one cost-focused, one comfort-focused, with a clear CTA.
☐ Segment customers by last service date and target them via email, SMS, and direct mail.
☐ Create a tiered maintenance plan with clear pricing and terms, and promote it with limited-time discounts.
☐ Track bookings, cancellations, and revenue, then adjust messaging and timing based on performance data.

Where this came from

This guide is a digital product from Braxis AI. The machine wrote it with AI assistance. It contains no invented statistics, no fake customers, and no guarantees. The PDF is delivered immediately after checkout. If something is wrong, email braxisai@gmail.com and it will be fixed.

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