

# HVAC Seasonal Maintenance Reactivation Playbook

A free HVAC reactivation playbook for turning dormant maintenance customers into spring and fall tune-up bookings with cleaner timing, messaging, and follow-up.

HVAC owners, service managers, dispatch leads, and office teams

## GUIDE

A free HVAC reactivation playbook for turning dormant maintenance customers into spring and fall tune-up bookings with cleaner timing, messaging, and follow-up.

## WHAT THIS ASSET COVERS

- A pre-season outreach cadence for overdue tune-ups and aging memberships
- Suggested call, text, and email angles for spring and fall reactivation pushes
- A simple prioritization model for high-value households and lapsed maintenance clients

## USE THIS WHEN

1. You want to pull maintenance revenue forward before the busy season
2. Your customer list is large but underused between urgent demand spikes
3. You need a reactivation motion that office staff can run consistently

## WORKING ASSET

## CORE GOAL

Pull overdue maintenance customers back into the calendar before the seasonal rush.

## FAST SEQUENCE

1. Export customers with no tune-up in the last 12 months.
2. Prioritize households with older equipment, prior repairs, or membership history.

3. Run a 10-day cadence across text, call, and email.
4. Tag every contact as booked, later, no response, or not a fit.

## **MESSAGING ANGLES**

- Prevent breakdown before peak weather.
- Protect efficiency and equipment lifespan.
- Offer simple booking windows, not vague callbacks.

## **SUGGESTED CADENCE**

- Day 1: text plus email
- Day 3: outbound call
- Day 6: text with shorter offer
- Day 10: final reminder

## **TRACK WEEKLY**

- contacts reached
- tune-ups booked
- replacement leads surfaced
- no-response rate

## **DEPLOYMENT NOTES**

### **HOW STRONG TEAMS ACTUALLY USE THIS ASSET**

- Assign one accountable owner instead of letting "HVAC Seasonal Maintenance Reactivation Playbook" become shared but unmanaged work.
- Use it with hvac owners, service managers, dispatch leads, and office teams in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### **BEST DEPLOYMENT SEQUENCE**

- You want to pull maintenance revenue forward before the busy season

- Your customer list is large but underused between urgent demand spikes
- You need a reactivation motion that office staff can run consistently

## **WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE**

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A pre-season outreach cadence for overdue tune-ups and aging memberships, Suggested call, text, and email angles for spring and fall reactivation pushes, A simple prioritization model for high-value households and lapsed maintenance clients.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.