

VOL. 02

Stop Losing Customers After the First Job

The Home Service Owner's Retention Playbook

A JobOS Pro Guide for Home Service Business Owners

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The leak you can't see on your P&L

Most HVAC and plumbing shops obsess over the cost of a new lead — \$150 to \$400 in paid search, plus the truck roll to win the job. Then they let that hard-won customer vanish. Industry data is brutally consistent: only about 20–30% of first-time home service customers ever call you again. The rest drift to whoever shows up first in their next Google search, which is usually not you.

The math is what makes this urgent. A one-time furnace repair is worth \$350. The same household, retained for 7 years across tune-ups, a water heater, a capacitor, and an eventual system replacement, is worth \$8,000 to \$15,000. You already paid to acquire them. Re-earning their next call costs you almost nothing — if you actually ask for it.

The leak doesn't show up on your P&L because the revenue you never captured was never a line item. That's exactly why owners ignore it for years.

The 48-hour follow-up window

The single highest-ROI retention move is a follow-up within 48 hours of finishing the job. Not a survey. A human-sounding check-in: "Hi Maria, this is Tom's HVAC — just making sure the AC is keeping up after yesterday's repair. Reply here if anything seems off."

This does three things at once. It catches callbacks before they become angry one-star reviews. It signals you're a real business that cares, which is rare enough to be memorable. And it opens a text thread you now own — a direct channel for every future offer.

- Send it as an SMS, not email. Texts get 90%+ open rates; service-business email lands in promotions.
- Reference the specific work done. "your water heater install" beats "your recent service."
- Always end with an easy reply path. A question that invites a response keeps the thread alive.

Build a maintenance rhythm customers don't have to remember

The best retention engine in home service is the maintenance plan — and not because of the recurring fee. It's because it gives you a legitimate reason to contact the customer twice a

year. A spring AC tune-up and a fall furnace check turn a one-time buyer into a twice-annual visit, and every visit is a chance to catch a \$4,000 replacement before the competitor does.

Even without a formal plan, you can manufacture the same rhythm. Tag every job with the equipment installed and its expected service interval. A water heater gets a flush reminder at 12 months. A new AC system gets a filter-and-tune-up nudge at 11 months, right before peak season.

- Set reminders by equipment age, not by calendar blast. A targeted "your system is due" outperforms a generic seasonal email 5-to-1.
- Price tune-ups to break even on labor — the goal is the doorway, not the \$89.
- Track plan members separately. They typically spend 2–3× more per year than non-members.

Turn happy customers into your cheapest sales channel

A referred customer closes faster, haggles less, and stays longer. Yet most shops never ask. The reason is timing: owners remember to ask for referrals at the office, days later, when the goodwill has cooled.

Ask at the peak of satisfaction — the moment the job is done and the customer is relieved their heat is back on. A simple text 24 hours after a five-star interaction works: "So glad we got you sorted, James. We grow mostly by word of mouth — if a neighbor ever needs us, here's a link that gives them \$25 off their first visit."

- Pair every referral ask with a small incentive on both sides. Reciprocity doubles participation.
- Only ask customers who signaled satisfaction (a thumbs-up reply, a paid invoice with no complaints).
- Make sharing one tap. A pre-written link beats "tell your friends about us."

Win back the ones who went quiet

Some customers won't return on their own — they've simply forgotten you exist. A win-back campaign targets households you haven't seen in 9–18 months. These are warm: they've paid you before and had no complaint. A nudge like "It's been a while since we checked your system, Linda — book a tune-up this month and we'll waive the trip fee" reliably reactivates 8–15% of a dormant list.

Segment by what they last bought. Someone who installed a furnace 10 years ago is a replacement prospect, not a tune-up prospect — and the message should say so.

Put it on autopilot with JobOS Pro

Doing all of this by hand is why owners abandon retention — there's never time. JobOS Pro runs it for you: **Ava**, the Follow-up Agent, sends the 48-hour check-in, catches callbacks, and asks for the referral at the moment of peak satisfaction, while **Scout**, the Rebooking Agent, watches equipment age and dormancy windows to trigger tune-up reminders and win-back offers automatically. You set the rules once; the agents work every customer, every day, without adding a single person to payroll.

Start free at jobospro.com — no credit card.