

Kill The Slow Season.

The recurring revenue playbook
for trade owners.

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WHAT THIS IS

The end of feast or famine.

Every trade owner knows the cycle. Spring is great. Summer is busy. Fall is okay. Winter is brutal. Or the reverse if you are in roofing or HVAC heat. This guide breaks the cycle.

You will not need a bigger ad budget.

You will not need to chase new leads in the slow months.

You will not need to lay off your best techs every January.

You will need to build a recurring revenue base. Maintenance plans. Auto-renewals. Members who call you first and only. This guide shows you how, with the pricing math, the scripts, and the install plan.

THE PROMISE

Make next January as good as last May.

When 30% of your revenue is recurring, the slow months stop hurting. Your techs stay busy. Your cash flow flattens out. You stop dreading the off-season. Some owners go a step further and make winter their best season.

THE MATH

Why January hurts.

Most owner-operated trade shops see a 40% to 60% drop in revenue between their peak month and their slow month. For HVAC in the south, January is slow. For HVAC in the north, May is slow. For plumbing, the swings are smaller but real.

The reason is simple. You are paid only when something breaks or something gets installed. In the slow months, fewer things break. That is the whole story.

MONTHLY REVENUE PEAK	SLOW MONTH (TYPICAL)	DROP	YEAR ON YOUR BANK
\$80,000	\$32,000	60%	Brutal
\$120,000	\$60,000	50%	Tight
\$200,000	\$100,000	50%	Tight

Now flip the model. Add 150 maintenance plan members at an average of \$25 a month. That is \$3,750 a month showing up in your account, every month, every year, no matter what is happening with new leads. Your January just got \$3,750 better. Without one new ad. Without one new customer.

And that is only the monthly fees. Plan members also call you first for repairs. Plan members are 4 to 7 times more likely to spend with you when something does break. The math compounds fast.

PART 1

The 3-tier plan.

Three tiers. Different price points. Different benefit levels. Most customers pick the middle one. That is the design.

Single-tier plans are easy to build and easy to sell, but they leave money on the table. Three tiers force a customer to choose between options instead of choosing yes or no. Yes is now the default. The only question is which one.

TIER	MONTHLY	ANNUAL	TYPICAL MIX
Basic	\$15 to \$25	\$180 to \$300	30%
Plus (middle)	\$25 to \$40	\$300 to \$480	50%
Premium	\$45 to \$75	\$540 to \$900	20%

Plus is the bullseye. 50% of customers go there. Make sure it looks like the best value. Basic exists to anchor the low end. Premium exists to anchor the high end and capture the customers who want everything done for them.

TIER 1 OF 3

\$15 to \$25 / month

Basic.

Position.

The entry-level offer. The anchor for the low end of your menu.

What is included.

One scheduled visit a year. A clean inspection report. 10% off any repair work. Priority scheduling over non-members. No diagnostic fee waiver. No parts or labor included for repairs. Equipment warranty is whatever the manufacturer says.

Who buys this.

Customers who want some peace of mind and a small discount but do not want to commit to much. About 30% of your members pick this. Some upgrade to Plus after their first year. Some stay on Basic for life. Both are fine.

TIER 2 OF 3

\$25 to \$40 / month

Plus. The middle tier.

Position.

The bullseye. The one most customers should pick. Make it obvious it is the best value.

What is included.

Two scheduled visits a year. Spring and fall, or whatever fits your trade. 15% off all repairs.

Waived diagnostic fee. Same-day or next-day service when they call. Extended labor warranty on installs. Priority over Basic members on scheduling during peak season.

Who buys this.

About 50% of your members pick this. Most are homeowners with one home and one system who want everything taken care of without overthinking. Plus is also the tier you steer customers toward in the tech script on page 9.

TIER 3 OF 3

\$45 to \$75 / month

Premium.

Position.

The top tier. The anchor for the high end. Captures customers who want full coverage.

What is included.

Two scheduled visits a year. 20% off all repairs. Diagnostic fee waived. First \$200 of parts and labor on any repair covered. Same-day service guaranteed. Extended equipment warranty. Replacement guarantee on covered failures within plan year. VIP scheduling all year.

Who buys this.

About 20% of your members pick this. Usually homeowners with multiple systems, higher incomes, or older equipment. Premium members are your highest-value customers and the easiest to retain year over year.

THE PRICING MATH

Run the numbers.

Here is what 200 members across all three tiers looks like on your bank account. Plus what those members will spend with you on repairs above the plan fee.

TIER	MEMBERS	AVG / MO	MONTHLY MRR	ANNUAL
Basic	60 (30%)	\$20	\$1,200	\$14,400
Plus	100 (50%)	\$32	\$3,200	\$38,400
Premium	40 (20%)	\$60	\$2,400	\$28,800
Total	200		\$6,800	\$81,600

ABOVE THE PLAN FEE

Members spend 3 to 5 times more on repairs than non-members.

Across 200 members, you can expect roughly \$80,000 to \$150,000 a year in repair work on top of the plan fees. Plan members call you first and only. Total annual value of a 200-member base is usually \$160,000 to \$230,000. All recurring. All forecastable.

PART 2

The tech script.

Every job. Every tech. Every time. This is what your tech says before they leave the home. Print it. Walk every tech through it. Make it the rule, not the suggestion.

Step 1. After the work is done. Before the invoice.

TECH SAYS**Casual. Confident. Not a hard sell.**

"Before I write this up, I want to tell you about something most of our customers are on. We have a maintenance plan that takes care of your [equipment] twice a year and saves you 15% on anything else we do for you. The Plus plan is what most of our customers go with. It runs \$[X] a month. Want me to set that up for you today?"

Step 2. If they ask 'What if I just want the basic one?'

TECH SAYS**Steer back to Plus. Do not negotiate down right away.**

"Sure, we have a Basic plan at \$[X]. The reason most people go with Plus is the diagnostic fee waiver and the same-day service. The math usually works out in your favor by the second visit. But Basic is a fine starting point if you want to try it for a year."

Step 3. The close.

TECH SAYS**Card on file. Set up the calendar.**

"Great. I will get the form on your phone right now. Quick three-line sign-up. Card on file. First spring visit will be in [month]. Anything else before I head out?"

PART 3

The post-job sequence.

The tech tried at the job. The customer said no, or maybe, or wanted to think about it. That is not the end of the sale. The post-job sequence catches roughly half of the customers who said no in person.

Three touches over seven days. One text. One email. One last text. All automated through your CRM. Goes out to every customer who got a service call and did not already join a plan.

WHEN	CHANNEL	WHAT
Day 1	Text	Thank you. Soft pitch. Calendar link.
Day 3	Email	Plan benefits in writing. Customer reviews.
Day 7	Text	Direct ask. Last touch.

Next page has the templates word for word. Drop them into your CRM. Adjust the brand name and the link. That is it.

PART 3 / TEMPLATES

Three messages. One sequence.

Day 1. Text. Thank you plus soft pitch.

FROM YOUR BUSINESS NUMBER**Goes out within 24 hours of the job.**

"Hi [name], thanks again for having [shop name] out today. Hope everything is running well. Quick note. Most of our customers are on our Plus maintenance plan. Two visits a year, 15% off repairs, no diagnostic fee. If you want to learn more, here is the link: [link]. Have a great week."

Day 3. Email. Benefits in writing.

FROM YOUR BUSINESS EMAIL**More detail. Customer reviews if you have them.**

"Hi [name], wanted to make sure you saw our Plus maintenance plan. For \$[X] a month you get two scheduled visits, 15% off repairs, same-day service, and waived diagnostic fees. Most of our members tell us the plan pays for itself in the first repair visit. Link to sign up: [link]. Reply to this email if you have any questions."

Day 7. Text. Direct ask. Last touch.

FROM YOUR BUSINESS NUMBER**Final ask. Then stop.**

"Hi [name], one last note from [shop name]. We have your plan account ready to go. Reply YES and I will send the sign-up link, or reply NO and I will leave you alone. Either way, thanks for having us out."

PART 4

Shoulder-season win-back.

In the months between peak and slow, you have the calendar space and the team time to go after past customers who never signed up for a plan. Free tune-up offer with sign-up. Most owners get 5% to 15% of past customers to bite.

Pull your customer list. Filter to anyone you have not seen in 12 months. Send the email below. Follow up with one text three days later. That is it.

The win-back email.

FROM YOUR BUSINESS EMAIL

Subject line: Free tune-up for [name]?

"Hi [name], it has been a while since [shop name] worked at your home. We are running a shoulder-season offer for past customers. Sign up for our Plus maintenance plan this month and we throw in the first tune-up free. That is a \$[X] visit on us, plus all the plan benefits going forward. Reply if you want to grab one of the open spots: [link]."

The follow-up text. Three days later.

FROM YOUR BUSINESS NUMBER

Short and friendly.

"Hi [name], [shop name] here. Wanted to make sure you saw the email about the free tune-up. We have a few spots left this month. Want me to grab one for you?"

PART 5

Pre-book April.

Your plan members owe you a tune-up. Most will not book it on their own. Use the slow months to pre-book the busy months. February books April. October books December.

In your slow months, your office has time. They have calendar space. They have a list of every plan member whose next visit is coming up. Call them. Book the spring visit now. Pre-load April so the techs are slammed.

This single habit turns slow-month time into fully booked peak-month days. And it shows the customer you are on top of their account.

The pre-book call. Office calls every plan member.

OFFICE SAYS

Confident. Clear. Two-door close.

"Hi [name], this is [office name] from [shop name]. Your next maintenance visit is coming up in April. We are booking April now to make sure you get a spot. I have Tuesday the 15th or Thursday the 17th open. Which one works for you?"

WHY THIS WORKS

The work was already paid for. You are just claiming the calendar.

Plan members already paid for the visit. They were going to use it anyway. All you are doing is moving the booking from reactive to proactive. The customer feels taken care of. The techs feel busy. The slow season feels less slow.

PART 6

The 30-day install.

You have the tiers. You have the math. You have the scripts. Now you install it. 30 days. Week by week. Most owners are signing up new members by Week 3 and pre-booking the next season by Week 4.

Week 1: Build. Set up the three tiers in your CRM.

Week 2: Train. Every tech learns the script and runs it on every job.

Week 3: Sequence. Turn on the post-job texts and emails.

Week 4: Win back and pre-book. Past customers and current members both.

ONE RULE

Do not skip Week 1.

If the tiers are not in your CRM, the techs cannot sign anyone up. If the pricing is fuzzy, the techs will hedge. Lock the tiers, the pricing, and the sign-up form before any tech runs the script. Build first. Sell second.

WEEK 1 / DAYS 1 TO 7

Build.

Goal. Set up the three tiers in your CRM. Lock the pricing. Lock the benefits.

DAY 1 MONDAY	Read this whole guide. Decide your three price points for Basic, Plus, and Premium.
DAY 2 TUESDAY	Write the benefit list for each tier. Use the templates on pages 5, 6, and 7.
DAY 3 WEDNESDAY	Build the three tiers in your CRM as products with monthly recurring billing.
DAY 4 THURSDAY	Set up the sign-up form. Make it mobile-friendly. Test it on your own phone.
DAY 5 FRIDAY	Print a one-page plan comparison your techs can hand to the customer at the door.
DAY 6-7 WEEKEND	Decide your launch date. Pick the Monday when every tech starts running the script.

WEEK 2 / DAYS 8 TO 14

Train.

Goal. Every tech learns the script. Every tech uses it on every job this week.

DAY 8 MONDAY	Run a 30-minute training. Walk every tech through the script on page 9.
DAY 9 TUESDAY	Have each tech run the script out loud with you. Three rounds. Fix the awkward parts.
DAY 10 WEDNESDAY	Today is launch. Every job gets the script. Track who tried it and who did not.
DAY 11 THURSDAY	Quick check-in with each tech at end of day. Any objections you heard? Note them.
DAY 12 FRIDAY	Count this week's plan sign-ups. Even one is a win. Tell the team what worked.
DAY 13-14 WEEKEND	Add an answer to each objection from Day 11. Update the script for next week.

WEEK 3 / DAYS 15 TO 21

Sequence.

Goal. Post-job texts and emails go live. The customers who said no get a second look.

DAY 15 MONDAY	Build Text 1, Email 2, and Text 3 from page 11 into your CRM.
DAY 16 TUESDAY	Set the triggers. Every completed service call without a plan kicks off the sequence.
DAY 17 WEDNESDAY	Test the whole sequence on yourself. Run a fake service call. Watch the texts come in.
DAY 18 THURSDAY	Send the sequence to your last 90 days of customers who never signed up. Backfill.
DAY 19 FRIDAY	Track replies and sign-ups. Update the script if a question comes up more than twice.
DAY 20-21 WEEKEND	Count this week's plan sign-ups. Note which channel they came from. Tech, text, or email.

WEEK 4 / DAYS 22 TO 30

Win back and pre-book.

Goal. Past customers get the win-back. Current members get the pre-book call.

DAY 22 MONDAY	Pull list of customers you have not seen in 12 months. Send the win-back email from page 12.
DAY 23 TUESDAY	Send the follow-up text to anyone who did not respond by end of day Tuesday.
DAY 24 WEDNESDAY	Office pulls the list of every plan member due for a visit in the next 60 days.
DAY 25 THURSDAY	Office starts the pre-book calls. Goal is 10 booked visits today.
DAY 26-27 FRI-SAT	Office runs the pre-book calls for the rest of the list. Keep the script on the desk.
DAY 28-30 FINAL DAYS	Count total new plan members and total pre-booked visits. Write the number down. Repeat next month.

PART 7

Two ways forward.

You can do everything in this guide on your own. Many owners have. It works. It also takes time. Here is the honest side-by-side.

	DO IT YOURSELF	DONE WITH EAC
Time to install	30 days if you do every step	30 days. Same plan.
Cost	Free. This guide.	\$1,000 up front. \$3,000 on day 31 only if you have 10 hours back. 14-day refund window.
Risk	You stop halfway. Most owners do.	Low. We hold you to the schedule.
The tiers	You design and price them alone.	We build them with you based on your market.
Weekly live session	None.	60 minutes a week with John and other owners.
Direct access	None.	Text John direct for the full 30 days.
Voice-Print of your business	Not included.	Built day one. Your team sounds like you on the phone.
Founders 50 rate locked	Not available.	Lifetime rate for the first 50 members.

WHO DIY IS RIGHT FOR. You like to do it yourself. You have one hour a day for 30 days. You will not stop when it gets boring.

WHO EAC IS RIGHT FOR. You have tried before and stopped. You want someone watching the work. You want the slow season fixed this year, not next year.

ONE LAST THING

January does not have to hurt anymore.

Build the three tiers. Run the script on every job. Pre-book the next season. Watch the slow months get smaller every year.

Print the script. Set the tiers in your CRM. Turn on the sequence.

Do it on your own with this guide. Or do it with us. Either way, do it.

READY TO TALK?

Book a 30-minute call.

We will price your three tiers together. No pitch. No pressure. If Win Back Your Week is a fit, we will say so. If not, we will tell you that too.

winbackyourweek.com

John Reay

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**We find the money your business
is already making but not keeping.**

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