

BASHOS for Home Services

CEO / President Sequence

Email 1

Subject: The revenue leak most home services CEOs miss

Hi {{First Name}},

When we talk with home services CEOs, we often hear the same thing:

“We generate plenty of leads, but revenue still leaks somewhere.”

The most common causes we see:

- missed inbound calls
- slow follow-up on estimates
- weak visibility into close rates
- no clear view of marketing ROI

Individually they seem small — but together they can represent **millions in lost revenue each year**.

Curious — where do you think the biggest revenue leak exists at {{Company}} today?

Best, Aaron

Email 2

Subject: The metric PE firms care about most

Hi {{First Name}},

When private equity firms evaluate home services companies, one metric usually stands out:

Revenue per technician.

It's a surprisingly powerful metric because it captures:

- sales effectiveness
- dispatch efficiency
- technician productivity
- average ticket size

The challenge is that many companies struggle to see this clearly across branches.

How easy is it for your leadership team to compare **technician productivity across locations** today?

Best, Aaron

Email 3

Subject: The \$5M marketing question

Hi {{First Name}},

A lot of home services companies spend **millions annually on marketing**.

But many executives still can't answer one simple question:

Which channels actually produce revenue?

They know:

- leads • calls • booked appointments

But not:

- closed revenue by channel • lifetime value • membership conversion

Out of curiosity — how clear is marketing ROI visibility at {{Company}} today?

Best, Aaron

Email 4

Subject: Tell me if this sounds familiar

Hi {{First Name}},

A pattern we see repeatedly in home services companies:

The business runs across **five different systems**:

- field service platform • marketing tools • accounting system • call tracking software • spreadsheets

Each works fine on its own.

But leadership rarely gets a **complete view of the customer lifecycle**.

Curious if this is something your team has run into as you scale.

Best, Aaron

COO / VP Operations Sequence

Email 1

Subject: Dispatch is rarely the real problem

Hi {{First Name}},

Most operations leaders focus on dispatch optimization.

But the biggest productivity issue we see usually happens **before dispatch**.

Things like:

- slow estimate approvals
- poor job handoffs
- technicians lacking customer history
- missed upsell opportunities

Those small gaps can quietly reduce **jobs per tech per day**.

How many jobs per technician does {{Company}} average right now?

Best, Aaron

Email 2

Subject: The hidden productivity killer

Hi {{First Name}},

One operational issue we see frequently in home services companies:

Technicians arrive onsite **without full customer context**.

They often can't easily see:

- prior service history
- open estimates
- membership status
- previous issues

That limits both efficiency and upsell opportunities.

How much customer history can your technicians see in the field today?

Best, Aaron

Email 3

Subject: The technician utilization problem

Hi {{First Name}},

Many service businesses track technician utilization, but fewer truly understand it.

For example:

Two technicians might both complete **4 jobs per day**, yet one generates **twice the revenue**.

Without deeper visibility, it's difficult to identify:

- best practices
- training opportunities
- upsell patterns

Curious — how easy is it to compare technician performance across your team?

Best, Aaron

Email 4

Subject: A simple operations question

Hi {{First Name}},

Quick question.

If your CEO asked you tomorrow:

“Which branch runs the most efficient service operation?”

How quickly could you answer?

Many operations leaders tell us it takes days to pull the data together.

Curious how long it takes your team to produce operational reporting today.

Best, Aaron

VP Sales Sequence

Email 1

Subject: The most expensive pipeline in home services

Hi {{First Name}},

One of the most expensive pipelines in home services isn't leads.

It's **unsold estimates**.

Many companies discover they have hundreds of quotes sitting in the system that were never revisited.

Often because:

- reps forget follow-up
- there's no structured pipeline
- there's no automated quote nurturing

Even a small improvement in follow-up discipline can produce a major revenue lift.

How much estimate follow-up is automated at {{Company}} today?

Best, Aaron

Email 2

Subject: The close-rate mystery

Hi {{First Name}},

Most home services companies track **close rate**, but fewer understand *why* it varies.

For example:

Two sales reps might both run 40 consultations.

One closes **50%**. Another closes **30%**.

Without deeper pipeline visibility, it's difficult to see:

• where deals stall • which messaging works • which reps need coaching

How clearly can you see those differences today?

Best, Aaron

Email 3

Subject: A forecasting question

Hi {{First Name}},

Quick question.

If your CEO asked you for **next quarter's replacement revenue forecast**, how confident would you feel in the number?

Many home services sales leaders still rely on:

• spreadsheets • rep judgment • historical averages

Which makes forecasting difficult.

Curious how your team approaches forecasting today.

Best, Aaron

Email 4

Subject: The follow-up gap

Hi {{First Name}},

A common issue we see in replacement sales:

Reps are great at **running consultations**.

But follow-up tends to break down.

Quotes sit untouched, and opportunities quietly disappear.

Some companies have added simple follow-up automation and recovered **millions in revenue**.

Out of curiosity — how structured is quote follow-up at {{Company}}?

Best, Aaron

VP Marketing Sequence

Email 1

Subject: The attribution illusion

Hi {{First Name}},

Most home services marketing teams can see:

- leads • calls • booked appointments

But not necessarily:

- closed revenue • repeat service revenue • lifetime value by channel

Without that connection, attribution becomes guesswork.

How clearly can your team see **revenue by marketing channel** today?

Best, Aaron

Email 2

Subject: The speed-to-lead problem

Hi {{First Name}},

Speed-to-lead is one of the most important metrics in home services.

Yet many companies discover that:

- web leads sit untouched • callbacks take hours • missed calls aren't tracked

Even small improvements here can dramatically increase booked appointments.

Do you know your average **speed-to-lead today**?

Best, Aaron

Email 3

Subject: The forgotten marketing asset

Hi {{First Name}},

Many home services companies spend heavily acquiring new customers.

But one of the biggest growth opportunities is often **the existing customer base**.

Things like:

- membership renewals
- seasonal service reminders
- upgrade opportunities
- referral programs

When lifecycle marketing is automated, it can produce substantial repeat revenue.

Curious how much marketing is focused on **existing customers vs new leads** today?

Best, Aaron

Email 4

Subject: The marketing reporting problem

Hi {{First Name}},

Quick question.

If your CEO asked:

“Which marketing channel produced the most revenue last quarter?”

How quickly could you answer?

Many marketing leaders still have to pull data from multiple systems to get the full picture.

Curious how your team approaches marketing reporting today.

Best, Aaron

Sub-vertical specific messaging focused on industry niche needs for a Roofer, an HVAC contractor, and a Pest Control firm

Let's focus on turning one-time service calls into long-term service contracts.

This is a **major revenue lever in home services**, but the mechanics differ by trade, so each email uses **industry-specific language and contract structures**.

1 - Roofing Contractor – Converting Repair Calls into Maintenance Agreements

Roofers are increasingly pushing **roof maintenance plans / inspection programs** to generate recurring revenue between replacement cycles. Repair calls are most typically referred to as “leak calls” in the industry.

Roofers are storm chasers. From heavy thunderstorms into more severe events, like tornadoes and tropical storms make their phone lines light up.

SUBJ: We can help you convert more leak calls into service contracts

Hi {{First Name}},

A question on the operations side of roofing businesses.

Many contractors we speak with get a steady stream of **small repair calls — flashing issues, leak patches, storm damage inspections — but those jobs rarely turn into ongoing relationships.**

Some operators are starting to use those service calls as an entry point for **annual roof maintenance and inspection programs**, especially for commercial or HOA properties.

The challenge tends to be operational:

- making sure techs offer the plan during the repair visit
- tracking which customers had a repair but no maintenance agreement
- following up before the next storm season

Curious if converting repair work into **maintenance contracts** is something you're actively working on at {{Company}}.

Best, {{Sender}}

Why it works

- Roofing lifecycle: **repair** → **inspection** → **maintenance** → **replacement**
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2 - HVAC Contractor – Converting Service Calls into Maintenance Plans

HVAC companies rely heavily on **annual service agreements (maintenance plans)**.

- Their busiest season for service calls is going to be late spring and fall - **the first time homeowners' AC or heating turn on for the first time**. Or when they DON'T turn on for the first time.
- Think about timing this

SUBJ: How you doing on converting service calls to maintenance plans?

Hi {{First Name}},

Quick HVAC operations question.

Many contractors generate a lot of **one-time repair calls during peak seasons**, but only a portion of those customers ever get converted into **annual maintenance agreements**.

That's a big missed opportunity since maintenance plan customers typically generate:

- repeat seasonal service visits
- higher lifetime value
- more replacement opportunities down the road

The tricky part operationally seems to be making sure:

- technicians consistently offer the plan during service calls
- follow-up happens if the homeowner says “not today”
- leadership can see conversion rates across the service team

Curious — do you currently track **how many repair calls convert into maintenance agreements?**

Best, {{Sender}}

Why it works HVAC leaders care deeply about:

- **maintenance plan penetration**
- **replacement pipeline**

3 - Pest Control Contractor – Converting One-Time Treatments into Quarterly Programs

Pest control companies rely on **quarterly service programs** as their core business model. The **critters come out from spring into summer**. You can expect them to be “swamped from May through August, depending on geography.

SUBJ: Here comes peak season - is your tech ready to convert service calls to service contracts?

Hi {{First Name}},

Quick question on pest operations.

Many pest companies still receive a fair number of **one-time treatments — ants, rodents, wasps, etc.** — but the real value is converting those customers into **quarterly protection programs.**

The operational challenge we hear about is consistency:

- making sure techs offer the recurring program during the initial visit
- identifying customers who declined but might reconsider later
- tracking conversion rates by technician or route

Even a small lift in converting one-time jobs into **recurring pest programs** can dramatically improve route density and long-term revenue.

Curious how you're currently measuring that conversion at {{Company}}.

Best, {{Sender}}

Why it works Pest control operators care about:

- **recurring programs**
- **route density**
- **customer lifetime value**