DATABASE

CLEAN UP YOUR CUSTOMER LIST IN FIVE STEPS

Before anyone dials, get the list right.

Most home service businesses have years of records sitting idle. Treat the list as an asset and work it on purpose.

1. **Clean.** Remove duplicates, fix phone numbers, and flag moved and do-not-call records.
2. **Segment.** Group by recency, equipment age, history and open estimates.
3. **Sequence.** Plan the calls, texts and email for each group.
4. **Convert.** Use trained people who book the visit.
5. **Measure and recycle.** Track results by group and feed non-converts into the next pass.

Repeat quarterly, timed to the seasons that drive your trade.

WHY THIS COMES FIRST

Dialing a dirty list wastes the most expensive thing you have: a trained person's time. It also annoys customers. Calling someone about a furnace they replaced three years ago, or a house they sold, tells them you don't actually know them.

STEP 1: EXPORT EVERYTHING

Pull customers, service locations, equipment, jobs, invoices, plans and estimates from your software. If you've changed systems over the years, get the older data too. Keep the original files untouched and work on a copy.

STEP 2: FIX THE BASICS

- Merge duplicates. Check by phone number first, then address, then email.

- Standardize phone numbers to ten digits.
- Split combined fields, so street, city, state and ZIP each have a column.
- Mark landlines and mobile numbers, if you can.
- Remove test records, vendors and employees.
- Separate the customer from the service address. Owners move, houses don't.

STEP 3: FLAG WHAT YOU CAN'T CALL

Do this before anyone sees the list. Mark internal do-not-call requests, people who complained, and active disputes or collections. Scrub against the National Do Not Call Registry and any applicable state lists. Note whether you have consent for texting. Read the calling rules and check with your attorney.

STEP 4: SEGMENT BY WHAT YOU KNOW

A segment is worth having if it changes what you say. Good starting segments:

- **Equipment age:** systems and water heaters by install year
- **Recency:** seen in the last 6, 12, 24 and 36 months
- **Plans:** active, expiring, lapsed
- **Open estimates:** by date and amount
- **Repair history:** repeat calls on the same equipment
- **Value:** total spent over the life of the account
- **Location:** ZIP code, so bookings can be clustered

STEP 5: MATCH THE MESSAGE TO THE SEGMENT

A customer with a 14-year-old system and an open estimate should get a different call than someone who had a faucet fixed last spring. Write a short script for each segment. Offer two windows. Book the visit, and let the technician handle the diagnosis.

STEP 6: PLAN THE SEQUENCE

Set the number of attempts, the time between them, and the channels you'll use. Decide when a record rests. A common mistake is working the list once, hard, and never

coming back. It's better to run a pass, rest the list and return next season with a new reason to call.

STEP 7: RECORD EVERY OUTCOME

Use a short, fixed set of outcomes: booked, not interested, call back later, wrong number, moved, already replaced, do not call. Update the record right away. "Already replaced" is valuable: note the equipment and ask who did the work. "Moved" tells you to reach out to the new owner, within the rules. Every call should leave the list better than it was.

HOW OFTEN TO CLEAN

Run duplicates and bad-number checks every quarter. Update do-not-call status on the schedule your attorney recommends, and before any campaign. Assign one person to own data quality.

STOP NEW MESS AT THE DOOR

Most list problems start at booking. Make phone, address and equipment fields required. Teach your CSRs to confirm details on every call, and give your techs a quick way to add equipment information. Once you've cleaned the list, estimate its value.

Sources: White Paper 05.

Published by Service ProCall. Last reviewed November 2026.

BEST PRACTICES: CUSTOMERS WHO NEVER HEAR FROM YOU AGAIN

MAKE IT A HABIT

What good looks like

> A clean list with a working phone number and the equipment age for most customers.

> Every customer contacted at least once or twice a year.

> Aging equipment flagged before it fails, not after.

The habits

1. Clean the list first: remove duplicates, fix phone numbers and mark do-not-call customers.
2. Sort by what predicts a sale: equipment age, last visit and open repairs.
3. Start with the warmest groups: lapsed members, recent repairs on old equipment and unsold estimates.
4. Lead with a reason to visit, such as a safety check or no-charge inspection, not a sales pitch.
5. Call during your slow weeks, so the work lands when you have room on the board.
6. Track every campaign from call to sold job, so you know what to run again.

Signs it's time to get help

- Nobody owns calling past customers, so it never happens.
- You buy leads while thousands of past customers go uncalled.
- Your board has open slots most weeks of the year.

How one shop did it: A contractor described by ACHR News columnists (name not published). Skipped ads and reached out personally to its own past customers. $135,000 in booked work in five days from about 250 contacts. ACHR News, October 31, 2025

Where we fit: Service ProCall runs this as equity mining: trained schedulers call your past customers and book visits into the slots your team can run.

More on customers who never hear from you again