MEMBERSHIPS

STOP LOSING MAINTENANCE PLAN RENEWALS

Renewal is a phone call, not an invoice.

Lapsed plans drift quietly to whoever calls first. A plan is your clearest signal that a customer wants a relationship.

- Pull expirations 60 days out each month.
- Call before the card fails or the term ends.
- Remind them what they received last year.
- Book the next visit on the same call.
- Keep trying lapsed members for 12 months.

Track renewal rate by tech and by trade. It is one of the best signs of how customers feel about you.

WHAT A PLAN IS REALLY WORTH

A maintenance plan gives you predictable visits, a reason to stay in touch and a chance to see equipment before it fails. It also smooths out the slow seasons, because plan visits can be scheduled when you need the work. Customers on plans tend to call you first. For many shops, these customers are also the first in line when a replacement comes up.

That only works if the plan renews. Selling plans while losing them out the back door is a treadmill.

MEASURE HONESTLY

Renewal rate = plans renewed ÷ plans that came up for renewal during the period. Don't include brand-new plans, or the number will look better than it is. Break it down by:

- Tech who did the last visit

- Whether all promised visits were completed
- Auto-renew or manual
- Year of membership, because first-year renewals are often the hardest
- How the plan was sold

DELIVER WHAT YOU SOLD

The most common reason people cancel is simple: they didn't feel they received anything. If you promised two visits a year and only made one, renewal becomes a hard conversation. Make completing visits a weekly report. Book the next visit before leaving the current one, whenever you can.

MAKE THE VALUE VISIBLE

Customers forget. Build these into every visit:

- A short written or photo report of what was checked
- A reminder of member benefits used this year
- Any savings on repairs, listed on the invoice
- A note about what's coming up next season

THE RENEWAL CALL

At 60 days out, a person calls. It's short and specific:

1. Who you are and which plan is coming up
2. What they received this year
3. Which tech came, and anything found
4. Next visit dates, with two windows
5. A simple request to renew

If you bill automatically, follow your state's automatic renewal rules and be clear about the terms. Send advance notice as those rules require. A card that fails shouldn't be how a customer learns about the renewal.

HAVE A SAVE OFFER

When someone says they're canceling, ask why, then listen. Reasons often sort into price, moved, replaced equipment, or felt no value. Options include a single tune-up, a

smaller plan or transferring the plan to the new owner if they've sold the home. Log every reason.

CHASE FAILED PAYMENTS

Many lapses aren't decisions at all. A card expired. Set up a process that alerts your office, then call within a few days. Don't assume the customer knows.

WIN BACK THE LAPSED

Work lapsed plans for 12 to 18 months. Give them a reason: a seasonal visit, a safety check or a chance to reinstate. Be honest about what's changed. Someone who cancelled because of a bad visit needs an apology before they need an offer.

BRING TECHS IN

Techs have more influence on renewal than anyone. Show them their numbers, and explain how plans help keep the schedule full in slow weeks. Include plan renewals in what you recognize, and watch for pressure. A customer who's pushed into a plan is likely to cancel.

CHECK THE ECONOMICS

Know what each plan actually costs you to deliver: labor, drive time, materials and discounts. Then look at the repair and replacement revenue those customers generate. If the math doesn't work, change the plan, not your effort. Finally, clean your list so renewal dates are right.

Sources: Service ProCall program guidance.

Published by Service ProCall. Last reviewed November 2026.

BEST PRACTICES: MAINTENANCE PLANS THAT LAPSE

MAKE IT A HABIT

What good looks like

> Renewals worked 60 days before they are due.

> Every member visit scheduled, not waited for.

> A renewal rate you track every month.

The habits

1. Schedule member visits proactively each season.
2. Start renewal calls 60 days out, with a reminder at 30 days.
3. Show members what they got: visits, discounts and what the tech found.
4. Make renewing easy, with auto-renew where your state allows it and a clear way to cancel.
5. Call lapsed members within 90 days with a reason to come back.
6. Treat plan members as your first list for every campaign.

Signs it's time to get help

- You don't know your renewal rate.
- Member visits are waiting for members to call.
- Lapsed members get no follow-up.

How one shop did it: Welsch Heating & Cooling (St. Louis, Missouri). Treats maintenance agreements as the work that fills spring and fall, at four or five maintenance visits per tech per day. About 250 agreements keep one technician busy for the slow 22 weeks of the year. ACHR News, July 2003

Where we fit: Service ProCall can call members for renewals and seasonal visits as part of a database campaign.

More on maintenance plans that lapse