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The Maintenance Plan Playbook

Build \$10,000/Month in Recurring Revenue

A JobOS Pro Guide for Home Service Business Owners

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Why recurring revenue changes everything

Most home service businesses live and die by the phone ringing. A slow week in shoulder season and payroll gets scary. A maintenance plan flips that: customers pay you a flat monthly or annual fee for scheduled tune-ups, and you get predictable cash flow plus a captive base for repairs and replacements.

The math is straightforward and powerful. Sign 200 customers to a \$25/month plan and that's \$5,000 in recurring revenue before a single repair call. Get to 400 members and you've crossed \$10,000/month — roughly \$120,000 a year that arrives whether or not the phone rings. Plan members also spend more: they call you first instead of shopping around, and tune-ups surface the worn capacitor or cracked heat exchanger that becomes a \$400 to \$4,000 repair you'd otherwise have lost to a competitor.

- 400 members at \$25/month = \$10,000/month recurring.
- Plan members spend 2 to 3x more annually than one-time customers.
- Recurring revenue is what makes your business actually sellable later.

Design a plan people actually buy

The biggest mistake is overcomplicating the offer. Customers don't want to evaluate a 12-item feature matrix; they want to know it's handled. Build two or three tiers, name them plainly, and lead with the benefit they care about: no breakdowns, priority service, and no surprise bills.

A proven structure for HVAC: a single tier at \$19–\$29/month covering two seasonal tune-ups, a filter, and 15% off repairs. Plumbing and electrical can mirror it with an annual safety inspection and priority scheduling. Whatever the trade, bake in two things that make members feel like VIPs and make the plan stickier: priority dispatch (members jump the queue) and a repair discount (10–20%) that nudges them to use you for everything.

Tier	Price	Includes
Essential	\$19/mo	2 tune-ups, filters, 10% off repairs
Priority	\$29/mo	Above + front-of-line dispatch, no diagnostic fee

- Keep it to 2–3 tiers with plain names.
- Always include priority scheduling and a repair discount.

- Price for the value of avoided breakdowns, not your labor cost.

Sell it at the kitchen table, every time

The best moment to sell a maintenance plan is when the technician is standing in the home and just fixed something. The customer is relieved, trust is high, and the pain of the breakdown is fresh. A plan that prevents the next one sells itself — if the tech actually offers it.

Make the offer a required step on every invoice, not an optional afterthought. Train techs on one simple line: "I can sign you up for our maintenance plan right now — it includes two tune-ups a year that catch problems like this one early, and you'd get 15% off today's repair. It pays for itself with one visit." Frame the monthly price against the repair they just paid for. Pay techs a small spiff (\$10–\$25) per signup and watch attachment rates jump.

- Make the plan offer a mandatory line on every job.
- Anchor the monthly price against the repair just completed.
- Spiff your techs per signup; it's the cheapest sales channel you have.

Make renewals automatic and painless

A maintenance plan only builds wealth if members stay. Churn quietly kills the model: lose 3% of members a month and you're refilling a leaking bucket. The two biggest churn causes are failed credit cards and members forgetting they ever had a tune-up coming.

Fix both with automation. Charge cards automatically and retry failed payments on a schedule — most "cancellations" are really an expired card nobody followed up on. Then actually deliver the value: proactively reach out to book each seasonal tune-up so members see what they're paying for. A member who gets two reminders and two visits a year renews; one who's billed silently and never serviced cancels the moment money's tight.

- Auto-charge with retry logic for failed cards.
- Proactively book every included tune-up — don't wait for the member to call.
- Send a once-a-year "here's what your plan saved you" recap.

Track the numbers that matter

Run your plan like the asset it is. Three metrics tell you everything: attachment rate (what % of eligible jobs convert to a plan), monthly churn, and recurring revenue per member. If

attachment is under 15%, it's a tech-training problem. If churn is over 3%, it's a delivery problem. If revenue per member is flat, your plan needs a higher tier or an upsell path.

Watch the upsell path closely, because that's where plans become genuinely lucrative. A member due for their tune-up is the warmest possible lead for an aging water heater, a duct cleaning, or a system replacement. The plan gets you in the door twice a year; the upsell is what turns a \$25/month member into a \$3,000 invoice.

- Attachment rate, churn, and revenue per member — review monthly.
- Under 15% attachment means retrain techs on the offer.
- Use every tune-up visit as an upsell opportunity.

Put it on autopilot with JobOS Pro

JobOS Pro turns a maintenance plan from a spreadsheet you forget about into a self-running revenue engine. Scout, the rebooking agent, automatically reaches out to every plan member to schedule their seasonal tune-ups and recover lapsed renewals before they churn. Rex, the upsell agent, watches each visit for replacement and add-on opportunities and serves your techs the right offer at the right moment — so one-time repair customers become members, and members become your most profitable accounts. **Start free at jobospro.com — no credit card.**