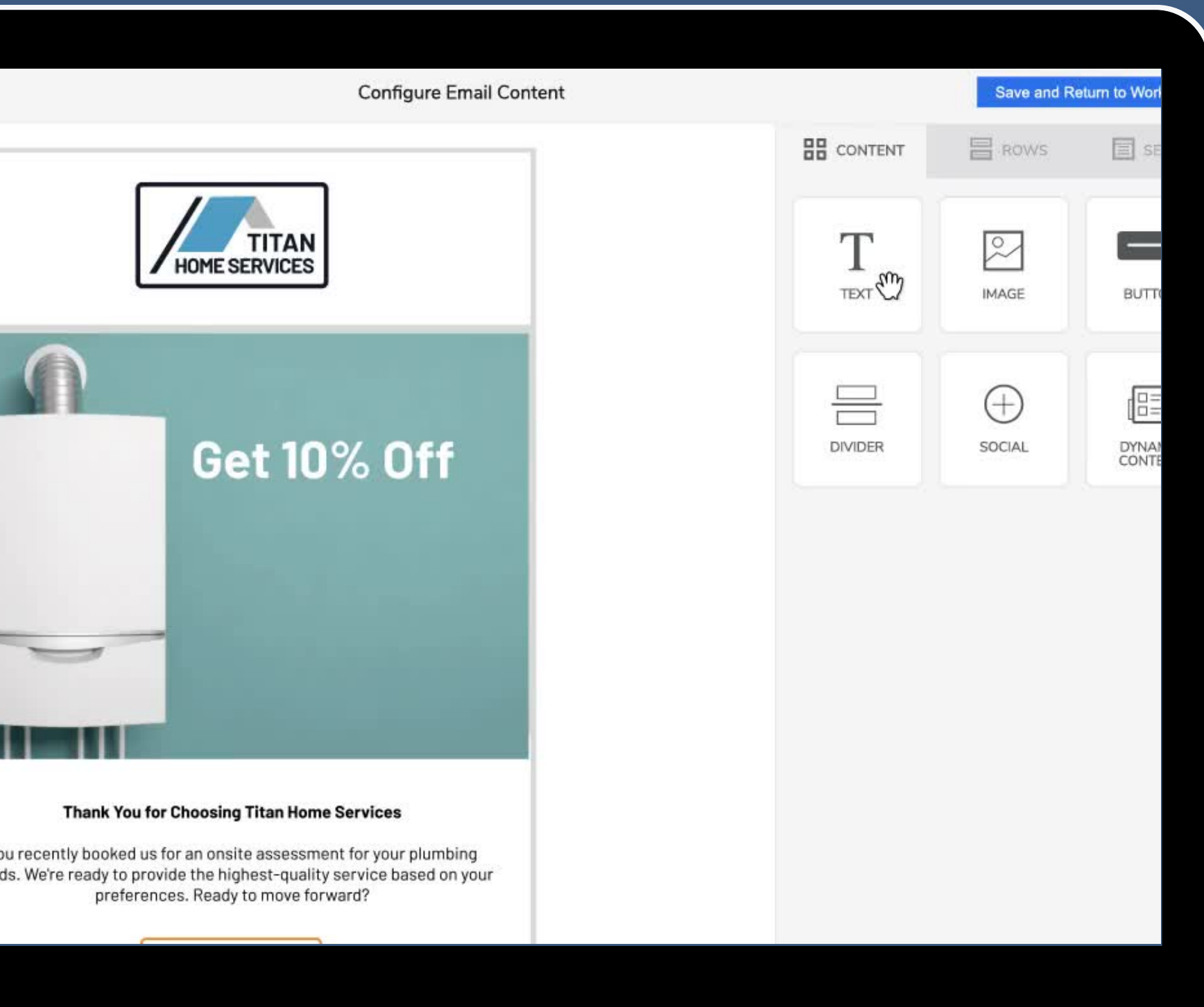


FALL MARKETING CAMPAIGNS

Templates and Audience Build Ideas You Can Use Today





MARKETING JUST GOT PERSONAL

ServiceTitan Marketing Pro is a hyper-targeted, integrated marketing automation solution that leverages your ServiceTitan data to create a personal customer journey. Redefine how you do marketing and tap into the limitless possibilities for your business.

The templates and audience build ideas presented in this e-book are designed for ServiceTitan Marketing Pro. If you are not yet a Marketing Pro user, visit www.servicetitan.com/marketingpro to request a demo.

BRAND AWARENESS

STAY TOP OF MIND WITH YOUR CUSTOMERS

Template Intent

To build brand awareness through local sponsorship and community care initiatives.

Customer Story

A horrible lightning storm led to fires in the surrounding communities. You want to send out a quick communication to make sure your existing customers are safe and let them know if they need your services, you'll be there when they need you most.

1

Audience Build Idea

Inclusion

Customer Accounts that have not had service between X and Y or called between X and Y.

2

Audience Build Idea

Inclusion

All customers in your database broken out into small segments based on timeline of purchase. No audience should be over 3,000 in a send.

See how personal you can get. Use exclusions to help break out your audience with tags such as membership status, zones, service completed, etc.



MEMBERSHIP RENEWAL

PUT YOUR MEMBERSHIPS ON AUTO-PILOT

Template Intent

To re-engage memberships that have *expired* and give customers an *incentive* to renew. We recommend you change content and refresh your audience every **4 weeks**.

Customer Story

Thomas is having his air conditioning unit serviced. The technician talks to Thomas about the benefits of a membership. Thomas replies by saying he had a membership previously, but he forgot to renew it and never received a message letting him know it expired.

Audience Build Idea

Inclusion

Membership status: *Expired* and dynamic filter Membership End Date *less than x days in the past*

Exclusion

Membership Status: *Active*



Limited-Time Discount On Renewal!

Renew Your Membership Now, And Get \$XX Off Your Annual Plan.

Call (XXX) XXX-XXXX

Dear {{customer_name}},

In case you forgot, we're sending you a quick reminder that your [Membership Name] membership has expired, and we don't want to lose you as a [Membership Name] member.

For a limited time, we'll take XX% OFF an annual membership — simply renew by [DATE] to receive your discount.

Your Membership Comes With These Exclusive Benefits:

- Priority Scheduling
- Service Repair Discounts
- Equipment Discounts
- [#] Maintenance Visits Per Year
- Placeholder xxx

Avoid The Inconvenience

MEMBERSHIP ABOUT TO EXPIRE

MAINTAIN A STEADY REVENUE STREAM

Template Intent

To prompt customers whose memberships are expiring soon to renew, and remind them of the valuable benefits they'll continue receiving with their renewal. This can be part of a drip campaign, with the last email in the campaign containing an incentive to renew.

Customer Story

Lisa has an older home with equipment she inherited from the previous owner that requires more frequent maintenance. She currently has a membership, which she's been happy with so far. While on the phone with a CSR, she asks when her membership expires and wonders if someone will contact her to remind her to renew before it does.

Audience Build Idea

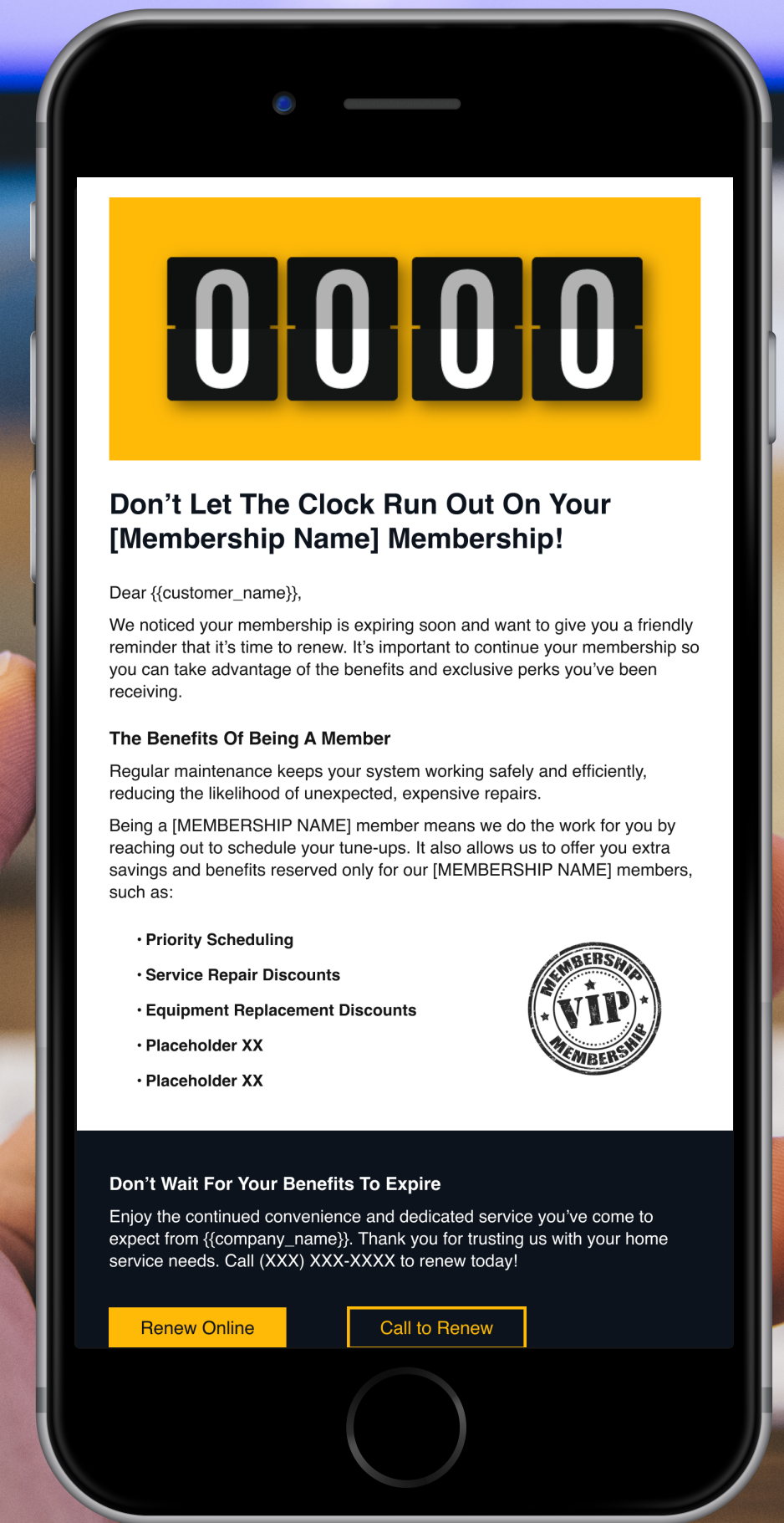
Inclusion

Membership Status: Active

Membership End Date: Dynamic filter between x and x days in the future.

Exclusion

Membership Status: Active and dynamic filter Membership Start Date greater than x days in the future.



FOLLOW UP

CAPTURE EVERY OPPORTUNITY

Template Intent

When you've had an interaction with a customer, such as when you've been in their home and given them an estimate on needed service, following up in a timely fashion can help you close the deal. Follow-up templates can help you maximize opportunities to convert open estimates into sold jobs.

Audience Build Idea

Inclusion

Technician name

Estimate: Open

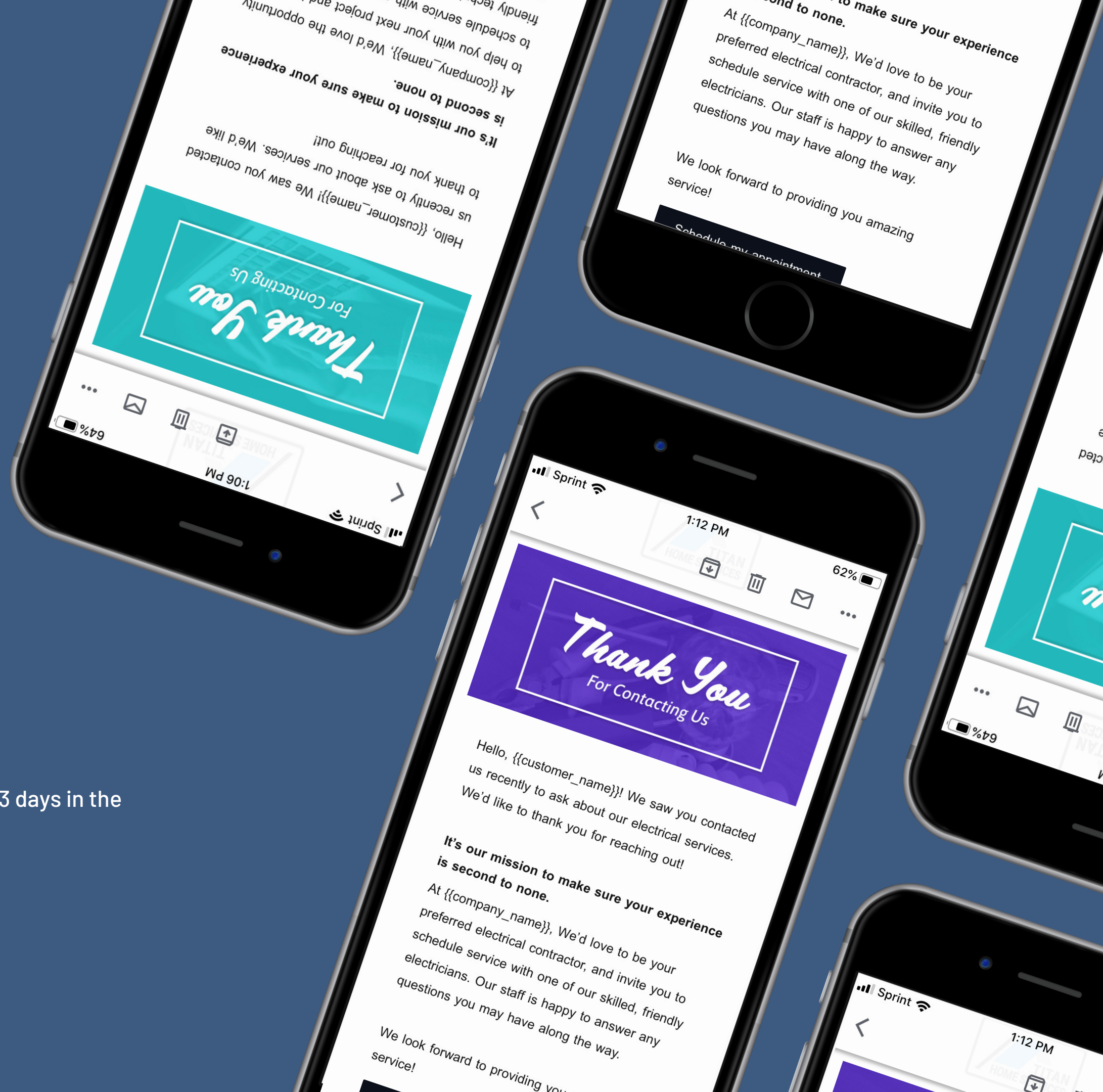
Business unit: Whichever unit sales fall under, and dynamic filter between 1 to 3 days in the past.

Exclusion

Estimate: Sold

Opportunity Status: Won, canceled, or dismissed

Business unit: Whichever unit sales fall under



FALL MAINTENANCE/INSPECTION

KEEP YOUR TECHS BUSY DURING THE SLOWER SEASON

Template Intent

To encourage customers to schedule their fall/winter equipment tune-ups now that cooler weather is on the way.

Customer Story

Erica hasn't had an inspection or tune-up in over 6 months and is overdue. We should reach out to her to ensure her equipment is working properly, so it doesn't break down at a bad time during the holidays.

Audience Build Ideas

Existing clients, broken out into smaller email blasts of less than 3000 at staggered dates and times. In order to do this effectively, add more exclusions such as: last call date, last email date, scheduled job date, zones, etc.



Protect your pipes with these easy fall maintenance tips!

{{customer_name}}, fall is just around the corner, and you may be planning to winterize your home in preparation for the change in seasons. This is a great time to check your plumbing and make sure it's safe and ready for colder temps.

Here are a few simple maintenance tips:

- Drain all outdoor hoses of any water that may be inside them, and store them in a dry area for the winter.
- Cover outdoor spigots and pipes with foam insulation to protect them from damage or bursting during freezing weather.
- Check all plumbing fixtures in your home such as faucets, shower heads and indoor pipes for leaks.
- Flush your water heater to help remove sediment buildup, and check that it's set to the correct temperature. It's also a good idea to insulate it if you live in areas with very cold winters.

You depend on your plumbing system to keep your home comfortable and safe. These tips can help you identify easily fixable issues before they turn into more expensive repairs or even safety hazards.

{{company_name}} is always on hand if you have questions about your plumbing or need maintenance help. Just give us a call, and we'll be there when you need us!

Call (XXX) XXX-XXXX

BRAND AWARENESS

STAY TOP OF MIND WITH YOUR
CUSTOMERS

Template Intent

This template helps build brand awareness through seasonal messages. Boost your brand by sending friendly greetings that create relatable mind triggers and an overall feeling of oneness with your customers.

Audience Build Idea

Market to your your membership customer base—*depending on size, you can break audiences out by:*

- Zone
- Technician Name
- Scheduled Job Date
- Membership Type..... etc



SEASONAL ADVERTISING

IT'S OKAY TO HAVE A LITTLE FUN WITH YOUR MARKETING!

Customer Story

We all know it's about time to turn that furnace on gently and put your A/C to rest until next year. Your client Sam, who lives in one of your specific zones and does not have a membership, has not had a tune-up in over 6 months (*Remember, we're changing seasons!*). It's time to reach out to Sam and get him booked, so he can start enjoying better indoor air quality and lower energy bills!

Intermediate Audience Build Idea - There are many!

Breakdown Example - Existing Customers Due For Service

Inclusion

Customer Type: Residential

Zone: Choose zones you want to test against or choose multiple zones until you get to 3000—the smaller the audience, the better. Test zones against one another or test by zip code.

Last Completed Job Date: 6 months ago or longer

Exclusion

Membership Status: Active

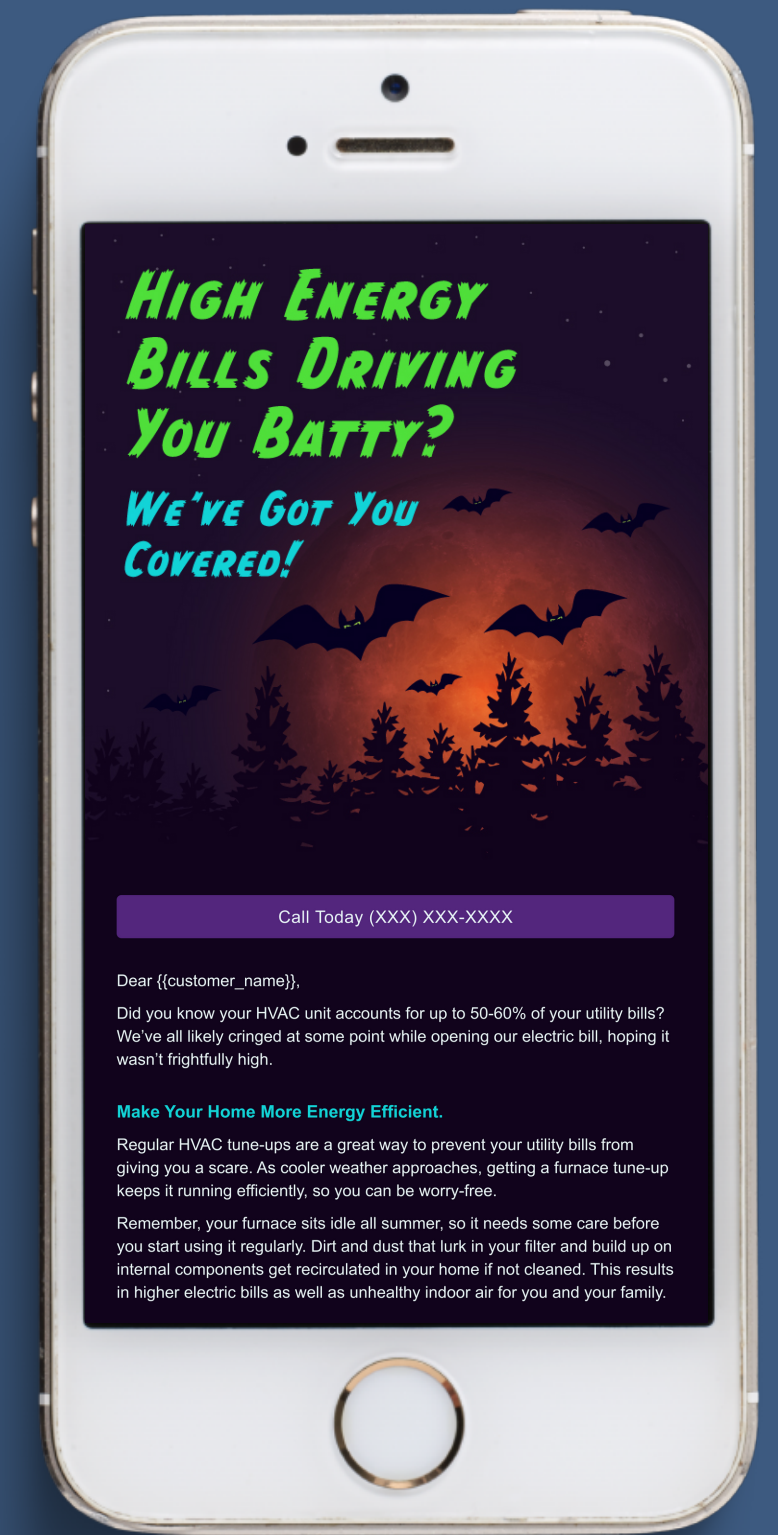
Zone: All zones not included from above

(*Hint: Find Zones under the Customer section*)

Template Intent

This template uses a seasonal event as a creative way to market to customers. While we know Halloween might look *a little different* this year, it doesn't mean we can't have a little fun!

Send this template to existing customers that are due for service, or even to your membership customers. When creating these campaigns, keep in mind—marketing is about segmentation and knowing which customers are responding, so you can get the most out of your efforts.



LEAD GENERATION

PROMOTIONS

Template Intent

The digital landscape has changed drastically since Covid-19, and essential services have a greater chance to compete in a saturated digital landscape of BIG players. *Take a chance* and participate; send customers your great product specials and installation discounts!

Audience Build Ideas

- Customers due for service in the next 1-3 months
- Idle customers that haven't had service in 6 months
- Membership customers due for service
- Membership customers by zone
- Unsold estimates - Offer a product discount first, then follow with an installation discount.



BRAND AWARENESS

SPREAD HOLIDAY JOY!

Customer Story For Audience Build

Your technician, Larry, just completed a job for Mrs. Smith a couple of days ago from your **service business unit**. You want to spread a little holiday cheer, so you send an email wishing her Happy Holidays after completing the service! This gives Mrs. Smith a little breathing room between invoice emails and marketing emails.

Audience Build Idea

Inclusion

Customer Type: Residential

Invoice Business Unit: Those that hold service calls

Job Completion Date: Between 1 and 2 days ago

Exclusion

Invoice Business Unit: Any that *don't* hold service calls



INFORMATIONAL

CONTACTLESS FEATURES!

Template Intent

We have an amazing customer portal that houses unpaid invoices and open estimates. Now is the best time to introduce customers to it and show them how to get in and use it.

Hint: Don't forget to send a "Request An Invitation!" email. One idea would be to send this as a part of a drip campaign for unsold estimates.

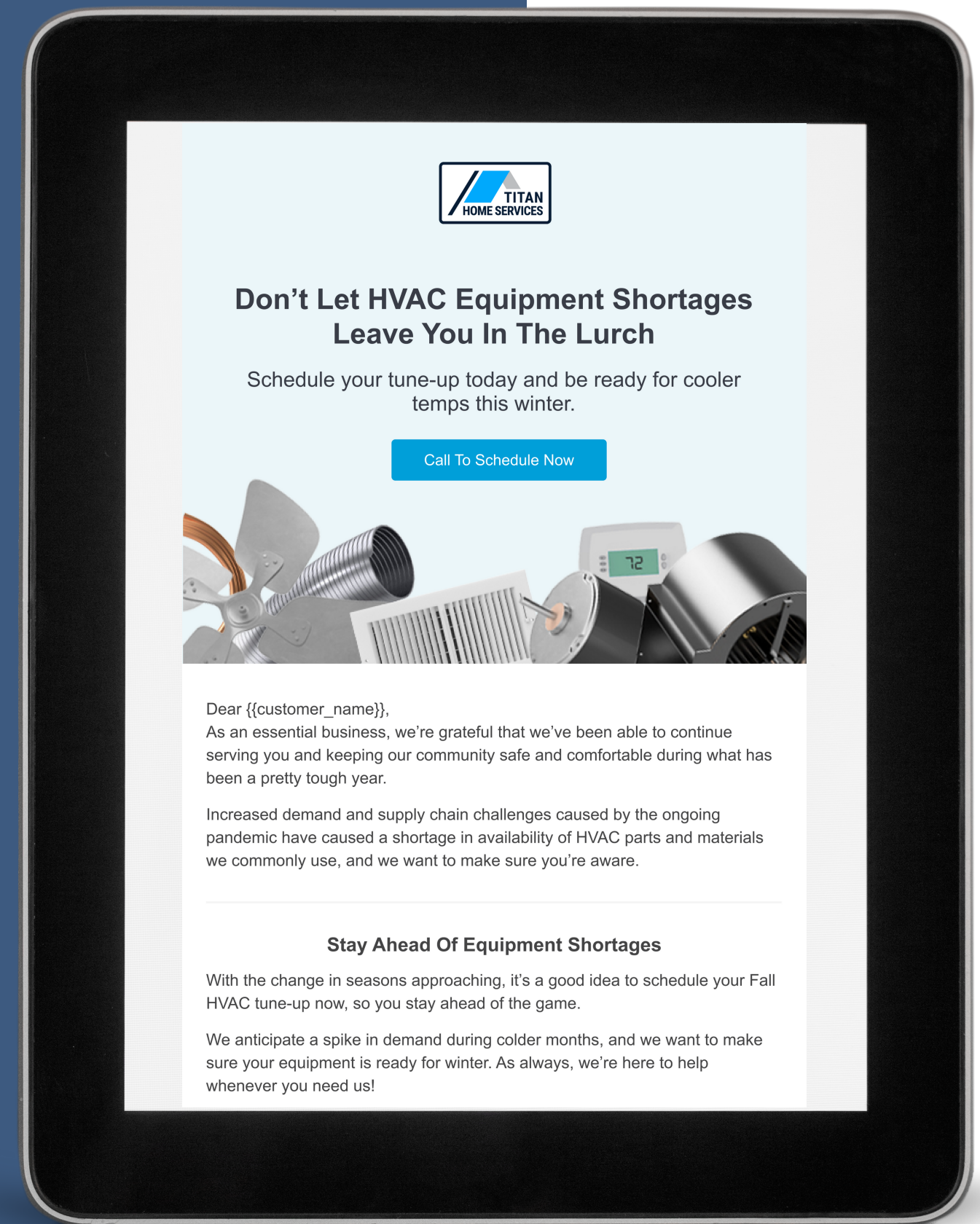


LEAD GENERATION

DISRUPTIVE MARKETING

Disruptive marketing is storytelling done in an attention-grabbing manner. But you should still make it simple enough for the client to understand.

In this template case, you are telling a story to create urgency due to new societal norms of supply and demand, and encouraging your customer to take action.



RESOURCES

Not yet on Marketing Pro? Email marketingpro@servicetitan.com

Marketing Pro customer? Join our [Facebook Group](#)

Need help getting started? Contact your CSM

Technical issues? Contact support@servicetitan.com

