

After the Webinar...

Resources & Next Steps

Shoulder Season Checklist

10 Essentials to Prep for Spring & Summer



Angie Snow



Principal Industry Advisor
ServiceTitan

Jim VanHorn



Owner
Home Climates, Inc

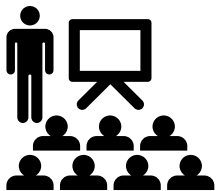
Optimize Business Operations & Training



Tip 1

Use forms to capture information and standardize services

- [Introduction to Forms](#)
- [How to Use Form Triggers](#)
- [Use conditional logic in forms](#)
- [Academy: Technician Forms](#)



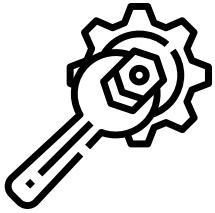
Tip 2

Train technicians and internal teams

- [Design your 2025 Call Center Training Plan](#)
- [\[Example\] Leverage Expired Membership Scripts](#)
- [Webinar: Sales Coaching to Empower Technicians](#)

Drive Revenue During Shoulder Season

Tip 3



Log all equipment details for smarter marketing

- [\[Example\] HVAC Call Debrief Form](#)
- [Manage Forms for Equipment in ServiceTitan Mobile](#)
- [Create an Equipment report template](#)
- [Recurring Service for Aging Equipment Report](#)



Segment audience based on aging equipment like UV Lights or Humidifier Pads. If you capture equipment age in the Equipment tab, you can trigger automated campaigns in Marketing Pro.

Tip 4



Schedule spring maintenance now

- 55% of Home Climates' system sales come from maintenance calls; 45% come from Demand Gen
- Schedule Spring Maintenances now before the busy season to identify system sales opportunities

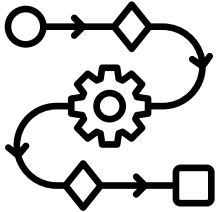
Tip 5



Promote energy efficient upgrades & indoor air quality improvements

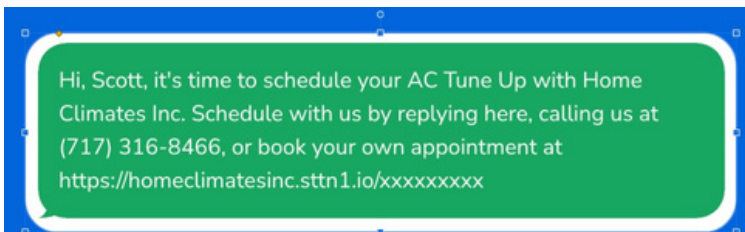
Optimize Marketing to Generate Jobs

Tip 6



Automate renewals & renewal notifications

- [How to Renew a Membership](#)
- [How to Manage Recurring Services](#)
- [Create Recurring Service Campaigns using SMS](#)



Give customers multiple ways to convert for a stronger customer experience.

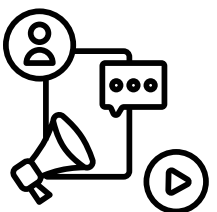
Tip 7



Use targeted & automated marketing campaigns

- [Marketing Pro Resources Hub](#)
- [Get Ideas in the Marketing Pro Facebook Group](#)
- [Master automation in Marketing Pro](#)
- [Try Marketing Pro Autopilot](#)

Tip 8



Continue investing in marketing & diversify channels

Prepare for a Strong Peak Season

Tip 9



Review performance, profits, expenses, and identify cost-saving opportunities

- Log into ServiceTitan to download your Spring Benchmark Report and see how you compare to other businesses on select KPIs

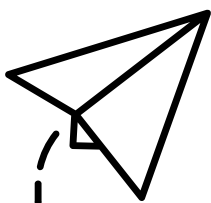
Tip 10



Make it easy to capture customers

- [10 Examples of Great HVAC Websites](#)
- [Set up Reserve with Google Booking Integration](#)
- [Book jobs 24/7 with fully integrated online scheduling with Scheduling Pro](#)

Bonus Tip



Dispatch Smarter with Dispatch Pro

- [Get a \\$100 gift card when you demo Dispatch Pro](#)
- [Learn about Dispatch Pro Console](#)