

Customer Database & Retention System

Home & Repair Services

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Designs a customer database and retention system — capturing every customer with service history and appliances owned, service-due reminders, follow-up, and re-engagement — so one-time jobs become repeat customers and you are not dependent on paid leads. Use it to build repeat business. For loyalty use the Repeat & Loyalty Program.

Purpose of this tool & output

Own your customers and bring them back

How the output is used

Use it to own your customers and bring them back — a customer database and retention system that drives repeat and AMC.

Important cautions

Your past customers are your cheapest next jobs; capture them with appliance/service history and remind them proactively (AC before summer, RO filter due) — this is how you escape dependence on paid leads and aggregators.

Companion documents

- AMC Renewal & Recurring Revenue
- Repeat & Loyalty Program
- Referral Program
- B2B / Society / Corporate Accounts
- Lapsed-Customer Win-Back
- Membership / Priority Plan

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