GUIDE

APRIL 4, 2026

THE 2TIER MEMBERSHIP YOU CAN LAUNCH THIS WEEKEND (OPERATOR'S GUIDE)

A field-ready playbook to stand up a simple two-tier membership (Basic and Priority) with exact inclusions, scripts, templates, and terms—so your shop can launch on Monday and start smoothing the board the same week.

FROM EPISODE

THE MEMBERSHIP THAT ACTUALLY SELLS: A 2-TIER PLAN YOU CAN LAUNCH THIS WEEKEND

CONTENTS

- What this solves (schedule math in one minute)
- Your 2 tiers (price bands, inclusions, and guardrails)
- Your one-page sell sheet (phone-ready layout)
- The 60-second tech offer (and the only spiff that works long-term)
- Follow-up that converts (SMS + email templates and timing)
- Scheduling rules and CSR language (so promises match capacity)
- Plain-English terms (auto-renew + cancellation without chargebacks)
- Launch in 2 hours, then measure what matters (targets included)

A plain-English, field-tested playbook to stand up a two-tier membership that smooths your schedule, protects margin, and gives techs a 60-second offer they'll actually make. Built for HVAC, plumbing, electrical, and pest shops with 2–10 techs.

WHAT THIS SOLVES (SCHEDULE MATH IN ONE MINUTE)

Your board doesn't break in July. It breaks in March when you left the shoulder season empty. A small base of members pre-loads tune-ups/inspections into March–April and September–November, so fewer "no-cool/no-heat" panics crowd peak days. Example: 20 members = 40 scheduled maintenance visits you place in shoulder months. Those same members also get priority when something does break, so they don't defect while non-members wait.

YOUR 2 TIERS (PRICE BANDS, INCLUSIONS, AND GUARDRAILS)

Keep it simple. Two clear options a tech can explain in 60 seconds.

- Basic — $[15–20]/month per system
    - 2 seasonal visits (HVAC: spring/fall tune-ups; Plumbing/Electrical/Pest: one comprehensive annual + one seasonal check).
    - 10% off repairs, capped at $[100–250] per job. No discounts on replacements/equipment over $[2,500] or exclude replacements entirely.
    - Priority scheduling within a [30]-day window (members booked before non-members when backlogged). Diagnostic in business hours: $[49].
- Priority — $[25–35]/month per system
    - Everything in Basic.
    - $0 diagnostic during business hours (Mon–Fri [8–5]). Trip/service fee still applies after hours unless you choose to waive.

- Same-day or next-day guarantee on no-cool/no-heat/leak emergencies in peak season.
- Dedicated member phone/text line: [MEMBER LINE PHONE] (route or ring distinct so CSRs know it's a member).
- Additional systems: +$[8–15]/month each.
- Seasonal maintenance expectations: disclose that tune-ups during June–July (or Dec–Jan for heat markets) are first-come, first-served; members are encouraged to book shoulder-season.
- Don'ts (margin killers):
  - Don't offer uncapped % discounts on big-ticket replacements.
  - Don't stack coupons with member discounts.
  - Don't promise unlimited emergency visits or same-day on non-emergencies.

Copy block for your site/sell sheet:

"Basic — $[BASIC_PRICE]/mo per system. Includes 2 seasonal visits, 10% off repairs (cap $[CAP]), and member priority within [PRIORITY_WINDOW_DAYS] days during backlogs. Diagnostic in business hours: $[DIAGNOSTIC_FEE]. Priority — $[PRIORITY_PRICE]/mo. Adds $0 diagnostic Mon–Fri [HOURS], a member hotline [MEMBER LINE PHONE], and same-/next-day on no-cool/no-heat. Additional systems +$[ADDL_SYSTEM_PRICE]/mo."

YOUR ONEPAGE SELL SHEET (PHONEREADY LAYOUT)

This is the one screen your tech shows the customer. Keep it thumb-friendly and obvious.

Header: "Keep Your Home Running — Pick One"

-

Box 1: Basic [icon]

- Price: $[BASIC_PRICE]/mo per system
- Bullets (3):
  - 2 seasonal tune-ups/inspections included
  - 10% off repairs (cap $[CAP])
  - Priority scheduling within [PRIORITY_WINDOW_DAYS] days
- Fine print: Diagnostic in business hours $[DIAGNOSTIC_FEE].
- Box 2: Priority [icon]
  - Price: $[PRIORITY_PRICE]/mo per system
  - Bullets (3):
    - $0 diagnostic Mon–Fri [HOURS]
    - Same-/next-day on no-cool/no-heat
    - Dedicated member line [MEMBER LINE PHONE]
- Below boxes (tiny text):

- “One system = one outdoor condenser or air handler/furnace pair (HVAC). Additional systems +$[ADDL_SYSTEM_PRICE]/mo. Member repair discount excludes full system replacements and is capped at $[CAP]. Peak-season maintenance windows may be limited; repairs always prioritized.”
- “Auto-renewing monthly. Cancel anytime by call/text to [CANCEL NUMBER] or at [CANCEL URL].”
- QR: “Full terms: [TERMS URL]”

Build it fast: a single mobile PDF or a page in your field app with two tappable “Add Basic” / “Add Priority” buttons that create the job tag and first maintenance visit.

THE 60SECOND TECH OFFER (AND THE ONLY SPIFF THAT WORKS LONGTERM)

Say it the same way every time. No feature dump. Offer, price, ask.

60-second pitch (HVAC example):

“Here’s how most folks avoid waiting days when it’s 95° — they’re on our Basic plan. It’s $[BASIC_PRICE] a month, two checkups included, and you jump the line in season. If you never want a diagnostic fee during business hours, Priority is $[PRIORITY_PRICE] and we guarantee same- or next-day on no-cool calls. Want me to add Basic now so we can pre-schedule your spring visit?”

3 common questions — shortest acceptable answers:

- “How do I cancel?” — “Text or call us at [CANCEL NUMBER]. Cancels immediately; you only pay for the current month.”
- “Do tune-ups really happen?” — “Yes. We schedule two each year and text you to confirm. Peak months fill up, so we book early.”
- “Does the discount apply to a new system?” — “No, we cap discounts at $[CAP] and don’t discount full replacements.”

Spiff that aligns everyone:

- Pay $[10–20] to the tech for each maintenance visit completed on a member, not for the sign-up. Result: techs want easy member tune-ups; you get the visits that surface repair opportunities.
- Optional CSR spiff: $[3–5] per successfully scheduled member maintenance during shoulder months (Mar–Apr, Sep–Nov).

FOLLOWUP THAT CONVERTS (SMS + EMAIL TEMPLATES AND TIMING)

Send the offer even when the customer said “not today.” Timing and clarity drive attach.

SMS (send within 1 hour of job completion):

- HVAC — priority window + included tune-up
  “Thanks for having us today. Want first-in-line booking and your next seasonal tune-up included? Our Basic Plan is $[BASIC_PRICE]/mo per system and locks a [PRIORITY_WINDOW_DAYS]-day priority window. Reply YES by [DEADLINE DAY] to include the first tune-up.”
- HVAC — $0 diagnostic + deadline
  “Quick heads-up: members pay $0 diagnostic Mon–Fri [HOURS] and get 10% off repairs. Priority is $[PRIORITY_PRICE]/mo with 2 visits/yr. Reply PRIORITY by [DEADLINE DAY] to activate before the heat hits.”
- Plumbing/Electrical/Pest variant
  “Members skip the line for [LEAKS/OUTAGES/INFESTATIONS]. Two checkups/yr and [FEE] diagnostics in hours. $[BASIC_PRICE]/mo. Reply JOIN by [DEADLINE TIME/DATE] and we’ll credit today’s service fee to your plan.”

Email (same day if SMS not answered; reminder 72 hours later if unopened):

-

Subject: “Skip the line this season (and include your next tune-up)”
Body: “Here’s the 60-second version: Members get first-in-line booking during heat waves, two seasonal checkups included, and 10% off repairs (capped at $[CAP]). Most homeowners choose Basic ($[BASIC_PRICE]/mo per system). Tap Add Basic and we’ll schedule your first visit now. Add Priority ($[PRIORITY_PRICE]/mo) for $0 diagnostic in business hours and a dedicated member line. Offer good until [DEADLINE DAY] at [TIME]. [ADD BASIC LINK] [ADD PRIORITY LINK]”

- Subject: “Last call: member priority before the first hot week”
  Body: “We hold a few priority slots for members each day. Enroll by tonight and we’ll reserve yours and include your spring tune-up. Choose Basic ($[BASIC_PRICE]/mo) or Priority ($[PRIORITY_PRICE]/mo). Cancel anytime. No long-term lock-in. [ADD BASIC LINK] [ADD PRIORITY LINK]”

SCHEDULING RULES AND CSR LANGUAGE (SO PROMISES MATCH CAPACITY)

Write it down so CSRs know exactly what to promise — and what not to.

Priority rules (put in your dispatch SOP):

- Backlog rule: If non-members are booking at [X] days out, members must be placed within [X-7] days (target: within [PRIORITY_WINDOW_DAYS] days max).
- Emergencies: Priority members get same-/next-day on no-cool/no-heat/leaks. Define “emergency” here: [YOUR DEFINITION].
- Maintenance windows: Book members’ tune-ups in Mar–Apr and Sep–Nov. Peak-season maintenance is first-come, first-served.
- Dedicated line: [MEMBER LINE PHONE]. Distinct ringtone or IVR “Press 1 for Member Services.”
-

Tagging: In your CRM/dispatch tool, tag jobs as [MEMBER-BASIC] or [MEMBER-PRIORITY] and surface on the board in a member color.

CSR language (paste into your call flows):

- Offer: “We can lock you into our member priority window so you’re not waiting weeks during a heat wave. Basic is $[BASIC_PRICE]/mo and includes your tune-ups. Want me to add it and grab your first visit now?”
- Expectation set: “During June–July, we prioritize repairs. If you prefer a tune-up then, book early or we’ll set it for spring.”
- Emergency clarity: “For Priority members, no-cool/no-heat is same- or next-day. Other work is booked as soon as the first member slot opens.”

PLAINENGLISH TERMS (AUTORENEW + CANCELLATION WITHOUT CHARGEBACKS)

Use one short paragraph in plain English. Run it by counsel once. Use it forever (with state-specific tweaks if required).

Terms snippet (paste on site/sell sheet; edit brackets):

“Membership is $[BASIC_PRICE]/month per system for Basic or $[PRIORITY_PRICE]/month per system for Priority and renews automatically each month until you cancel. Includes [2] seasonal maintenance visits per system per year, a [10]% repair discount capped at $[CAP] per job (excludes equipment replacements and after-hours work), and priority scheduling as described above. Priority members receive $0 diagnostic during business hours (Mon–Fri [HOURS]); standard after-hours fees apply. Cancel anytime by calling or texting [CANCEL NUMBER] or visiting [CANCEL URL]; cancellation is effective at the end of your current billing month. Maintenance visits during peak months may be limited and are first-come, first-served; repairs are always prioritized.”

Also do this:

- Put renewal/cancel language immediately next to the price and above the sign-up button.
- Email/text a confirmation with the key terms.
- Keep a simple, documented cancel path: inbound text keyword “CANCEL” to [CANCEL NUMBER] triggers a call-back or automated cancellation with confirmation.
- If you offer annual prepay, allow a straightforward pro-rated refund policy you can actually honor.

LAUNCH IN 2 HOURS, THEN MEASURE WHAT MATTERS (TARGETS INCLUDED)

You can stand this up in two hours and start selling after lunch.

90-minute build:

1. Price it (12 min): Pick $[BASIC_PRICE] and $[PRIORITY_PRICE]. Set cap $[CAP]. Decide diagnostic $[DIAGNOSTIC_FEE] and after-hours fee. Exclude replacements.
2. Draft sell sheet (25 min): Use the layout above; export as a one-page mobile PDF. Save to [FIELD APP/DRIVE] for techs.
3. Write terms (15 min): Paste the snippet; add [CANCEL NUMBER], [CANCEL URL], and [TERMS URL].
4. SMS/email templates (18 min): Paste, set [DEADLINE DAY/TIME]. Load into [TEXT TOOL/CRM].
5. Dispatch rules (10 min): Add tags [MEMBER-BASIC]/[MEMBER-PRIORITY], color on the board, backlog rule, and emergency definition.
6. Dedicated line (10 min): Point [MEMBER LINE PHONE] at current CSR with a distinct ringtone.

30-minute training (Monday):

- Techs (15): Show the sell sheet; each tech says the 60-second pitch once. No roleplay theater.
- CSRs (10): Read the three promises and the emergency definition out loud. Practice the offer line.
- Owner/GM (5): Set the spiff: $[10–20] per completed member maintenance.

Track 3 numbers weekly (put on your scorecard):

- Attach rate: memberships sold ÷ service calls. Starter target: 20–30% on tech offer; 30–40% with SMS follow-up when offered every job.
- Renewal rate (month 4): members active after 90 days ÷ members who joined 90+ days ago. Target: 80%+.
- Maintenance completion rate: completed seasonal visits ÷ promised visits. Target: 85%+ by end of shoulder season.

If a number slips, the fix:

- Low attach? Techs aren't offering every time or the sell sheet is busy. Simplify and retrain.
- Low renewal? Missed tune-ups or confusing billing. Tighten scheduling and make cancellation/easy terms obvious.
- Low completion? Block shoulder-season slots on the board now and have CSRs call/text members this week.