

*Email Campaign*



**BREACH  
REVELATION**  
*Maintenance Edition*

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# *Customer* ENGAGE



We know a one-time purchase will need maintenance at some point but how to keep in touch with your customer to ensure that business comes to you?

*Creating quarterly or monthly reminders help with retention*

## Review Past Customer Invoices

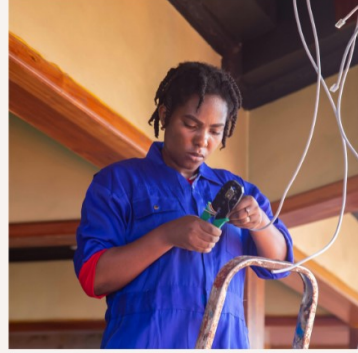
Analyze your customer data to identify service patterns, frequency, and seasonal trends.

Look for customers who haven't used your services recently or those due for regular maintenance.

# *Create* CUSTOMER LIST

## Create Customer Lists Based on Need

Segment your customers into groups: recent clients, overdue maintenance, seasonal services.



Remember, each group has different needs and motivations.

You will want to speak to these directly.

*Don't send a  
one size fits all email*

# Email PROCESS



1

## Create Tailored Email

Write specific messages for each customer group. Use personalized subject lines, relevant service reminders, special offers, or maintenance tips that speak directly to their situation.



2

## Track Responses

Monitor responses and follow up immediately with interested prospects. Use the results to refine future campaigns. Keep notes on what works best for each customer type.



3

## Begin posting!!

Create a follow-up sequence for non-responders. Send a revised version 7-10 days later, then a final email after another week. Sometimes timing is everything in service businesses.



# RESULTS

*Tracking*

Use your CRM to send the Campaign so whoever pulls up a customer, they can **see immediately** they were sent an email, what if any discount was offered, and what was included.

Use the response rate for future and seasonal campaigns.

Update your **Campaign Lists** automatically using your CRM Workflow features, so that when a new customer is added, they are automatically added to the correct **Campaign List**.

Your customers should be one more that one list, for example...



Mrs. Smith has her garage door fixed and her pool cleaned. She's been meaning to schedule gutter cleaning as well.

### SUGGESTED CAMPAIGN LISTS

- Household Quarterly Reminder
- April Summer Pool Reminder
- Thanksgiving Thank You for Being Our Customer
- Christmas Wishes Year End

Be sure to confirm with your customer their desire for email frequency.

Use your opt-in settings or add a drop-down to your Contact record to control Campaign additions.

You should see increases  
in business  
in no time!





# NEED HELP?

*Just Ask*

## WE'D LOVE TO HELP

We can assist with training you to make your own customizations or we can do them for you.

### Including

- Building the Email Template
- Setting up Group Email
- Setting up your Campaign
- Add a drop down
- Create a new module
- Training on all the above

CRM customization can be tailored to how you do business.

We have many different areas we have customized for including events, lessons for schools, reservations, help/support desk, etc.

We can create most anything you can think of to do in your CRM.

Let's do a design session today!



# BREACH REVELAITON

*Maintenance*

*Email Campaign*

*Let's Chat*

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