

# Does Direct Mail Still Work for HVAC?

Fill this in as we go. By the end you'll know who to mail, what to say, when to send it, and how to tell whether it paid.

Tuesday, September 15, 2026

3:00 – 4:00 PM EDT

 Hosted by **All Contractor**

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NAME

COMPANY

CITY / MARKETS YOU SERVE

## 01 Where you stand today

BASELINE

**Last mailer: who got it, what was the offer, how many drops?**

Did it work — and how do you know?

**Past customers not booked in 18 months**

Pull the real number from your CRM

\_\_\_\_\_ Avg ticket \$ \_\_\_\_\_ CSR booking rate \_\_\_\_\_ %

**WHY IT WORKS** Mail stays visible until the need arrives: Notice → Understand → Save → Remember → Call. The campaign often wins before the homeowner is ready to buy.

## 02 Pick the format

FORMAT

- ☐ **Standard postcard** — one service, one offer, to a customer or prospect list
- ☐ **EDDM postcard** — broad route coverage; services most homes need
- ☐ **Sales letter** — bigger decisions that need explaining and trust

Format follows the audience and how much explaining the sale needs.

## 03 Pick the trigger

TIMING

- ☐ Seasonal demand
- ☐ New service area
- ☐ Slow schedule
- ☐ Past customers
- ☐ Memberships
- ☐ New service

Month I'll drop: \_\_\_\_\_

## 04 Build the list from your best jobs

AUDIENCE

**Where does the work come from?**

Top ZIPs, neighborhoods, drive-time areas

**What do those homes share?**

Home age · ownership · value · income · length of residence

**List source**

Define criteria → source → clean &amp; dedupe → track

- ☐ My customer list ☐ EDDM routes ☐ Purchased targeted list

## 05 Write your card — one strong offer

CREATIVE

MY LEAD OFFER



The one service

The action — call, scan, visit

The deadline

Tracking number / URL / code

- ☐ **One service** — focused
- ☐ **One offer** — clear at a glance
- ☐ **One action** — exactly what to do
- ☐ **Minimal copy** — room to breathe

- ☐ **Useful** — checklist or reminder
- ☐ **Relevant** — a need coming soon
- ☐ **Clear** — offer & phone easy to find
- ☐ **Durable** — survives the fridge

**STAYING POWER** The best mailpiece keeps working after the first glance.

## 06 Plan repeated touches

FREQUENCY

| TOUCH                                              | DROP DATE | WHAT THIS PIECE SAYS |
|----------------------------------------------------|-----------|----------------------|
| <b>1 Introduce</b> — brand + core offer            |           |                      |
| <b>2 Reinforce</b> — same look, same offer         |           |                      |
| <b>3 Remind</b> — another reason to save it        |           |                      |
| <b>4 Stay available</b> — there when the need hits |           |                      |

Judge it as one campaign, not four mailings. **Before it lands:** show your CSRs the piece so every caller gets the same offer and the code gets logged.

## 07 Do the math — what is one campaign worth?

YOUR NUMBERS

|                       |   |                                       |   |                                |   |                      |   |                                |   |                                            |   |                                   |
|-----------------------|---|---------------------------------------|---|--------------------------------|---|----------------------|---|--------------------------------|---|--------------------------------------------|---|-----------------------------------|
| <b>A Homes mailed</b> | × | <b>Response rate</b><br>your estimate | × | <b>Booking rate</b><br>from 01 | = | <b>C Booked jobs</b> | × | <b>Avg ticket</b><br>= revenue | - | <b>All-in cost</b><br>print, postage, list | = | <b>Net</b><br>cost/job = cost ÷ C |
|-----------------------|---|---------------------------------------|---|--------------------------------|---|----------------------|---|--------------------------------|---|--------------------------------------------|---|-----------------------------------|

Use conservative inputs. Not comfortably positive? Fix the booking rate or ticket before you mail.

## 08 Track sold work

MEASURE

- ☐ Qualified calls & appointments booked
- ☐ Jobs sold
- ☐ Cost per lead & cost per job
- ☐ Revenue & gross profit

**Ignore:** scans with no response, unanswered calls, one mailing judged too fast, lead counts with no revenue.

## 09 My three commitments

BY WHEN

|          |  |  |
|----------|--|--|
| <b>1</b> |  |  |
| <b>2</b> |  |  |
| <b>3</b> |  |  |

## 10 Are you ready to mail? Score yourself

1 POINT EACH

- ☐ We can pull past customers not booked in 18 months
- ☐ We have one offer with a dollar figure
- ☐ Our reviews are strong and we answer them
- ☐ We have a landing page that matches the card
- ☐ We know our CSR booking rate this month
- ☐ We know which ZIPs and homes produce our best jobs
- ☐ That offer has a printed deadline
- ☐ Our Google Business Profile is current
- ☐ We can dedicate a tracking number to it
- ☐ We can commit to repeated touches, not one drop

### 8–10 Mail now.

Pull the list this week; calendar the touches.

### 5–7 Mail small.

Start with past customers; fix the rest in parallel.

### 0–4 Not yet.

Reviews and Google profile first — mail amplifies what's there.



### Make sure they find you when the card lands.

Homeowners look you up before they call. Run a free local listings audit and see what they'll find.

[ai.allcontractor.com/scan-business](https://ai.allcontractor.com/scan-business) · (404) 419-6884 · [support@allcontractor.com](mailto:support@allcontractor.com)