“Tuck-In” Acquisition Process:

**Scope:**

To execute a series of formal communications to the acquired customer base, informing them of the change in business ownership. These communications should take place immediately in the week of the final acquisition.

**Objective:**

To maintain, or strengthen the level of trust in their home comfort provider.

Customers will want and expect:

1. Expect continuity in transition
2. Want to “Trust” the new provider

To maintain 100% of active customer base in the newly acquired affiliate.

**Strategy:**

Send two letters, 1 each week, (Possible Service Kit) and final follow-up with phone contact.

1. Letter 1 originates from the previous owner of the business.
2. Letter 2 originates from the New Owner/General Manager of the acquiring company and carries a different message. You may elect to include a service coupon, a service kit, equipment stickers etc.… and perhaps a promotion for a service agreement or special tune-up price.
3. Last contact is a direct phone contact as a final follow-up call.

The last letter needs to state that the customer should expect a call from the customer support team, to create an expectation, then the acquiring company can deliver on its first promise by following up with the call to answer any questions the customer may have.

**Timing:**

The 1st letter should be mailed immediately after acquisition closes and the database can be acquired. The goal is to produce a 10% customer return rate over the coming 12 months.

Letter 2 is mailed the following week. It contains an offer of discounted services in an effort to encourage trial and repeat business (We use a USA – Service Agreement).

Phone contact is made the same week as the 2nd letter with tracking mechanism in place to measure results.

**Execution:**

After the letters are mailed, it is important to track the results of customer retention.

This tracking will serve to help evaluate the success, or need to improve the process, or materials.

The company needs to determine the coupon value, create a coupon, and date the coupon for expiration.

Header

Date:

Dear Friend and Valued Customer,

As a valued customer of (XXXX Heating and Cooling) we wanted to take this opportunity to “Thank You” for your business, and share some very exciting news about the future and our relationship with our customers, and community.

Over the years, (XXXX Business) has prided itself on serving our customers. We have always known that our customers wanted the very best products and services, at the best possible value. At (XXXX) we have tried very hard to operate with that philosophy in mind.

To that end, I have decided it was in the best interest of my customers, and the employees of (XXXX) to join forces with the leading service company in indoor comfort. It turned out to be an easy choice, because our philosophies of serving the customer first, were exactly the same.

I have chosen to join forces with (XXXX).

We here at (XXXX) will have the same goals we always have had:

**Serving our Customers by exceeding your expectations**

Our phones, business cards, and letterhead may now say (XXXX), but you should still expect the same commitment to excellence from our team of professionals. In fact, it is my intent to work with our new team, to improve all aspects of the business to better serve you.

All of us at (XXXX) have appreciated the opportunity to call you a friend, and a customer. It is because of your loyalty and support, we have been able to grow our business over the years and become the kind of indoor comfort service provider, our customers expect.

Without you, our new team of dedicated professionals would not have been possible. We here at (XXXX hope you have enjoyed our relationship, and we look forward to serving you for many years to come.

(John Doe)

(XXXX)

Enclosures: Furnace – A/C sticker, New Business Card, Coupon Tune-Up

Header

Date:

Dear Friend and Valued Customer,

Just a few days ago, you should have received a letter from a valued member of the (XXXX) Team, John Doe.

I am writing to you today as a follow-up to (John’s) letter, and to introduce myself. My name is (Gary Elekes) and I am the Owner & Manager of (XXXX).

As John mentioned in his letter to you, he and his very dedicated team have decided to join forces with our team of professionals here at (XXXX).

This is truly an exciting time for us at (XXXX). It is a unique opportunity for us. We consider you a valued customer and hope to earn your business.

We have tried to put ourselves in your position in an effort to understand more fully what you might expect. In doing so, we reminded ourselves that as a customer we would expect several things, such as a smooth transition as we combine the two teams. We also felt our customers would expect to receive some additional benefits for being a partner in our success. We recognize that this may the first time you have had an opportunity to form a relationship with (XXXX) even though we are a leading service company in the area.

I have enclosed a (20/$50.00) discount certificate for you to use as you see fit. This certificate is good for one year, and you can use it any way you like. You can even give it to a friend if you desire. We appreciate any referrals and hope to earn your trust.

(John) told you about our philosophy of doing business. At (XXXX) we have one goal:

**To serve our Customers by exceeding your expectations!**

This is a lofty goal, but we are confident we can earn your business, and trust given the chance.

You may receive a follow-up call from our Customer Support Team in the next week to answer any questions you may have. This is not a sales call. It is our effort to make sure you have any and all your questions answered and we begin our new relationship by earning your trust.

Thank you for your business, and the opportunity to serve you as a customer.

(Gary Elekes) (John Doe)

(XXXX) (XXXX)

Enclosures: Business Card, Certificate, Furnace – A/C Sticker

Basic Telemarketing Script

**“Hello (Mr./Mrs. Jones), I’m “Just Rosie” calling from (XXXX), to follow-up with you to make sure you received our letter and gift certificate last week, did you?”**

*(Wait for a response – Yes I did - continue) (No I didn’t – jump down)*

**“(Gary Elekes), our General Manager asked me to contact you to see if you had any questions about the letter or our company?”**

*(Listen for questions and respond accordingly – Train the telemarketer on questions and your responses – Warranty/USA)*

**“Gary also asked me to be sure you were comfortable with the transition of (XXXX Heating and Cooling) becoming part of the (XXXX) Team?”**

*(Listen for any concerns/note them and respond – Train the telemarketer on responses to concerns that you anticipate)*

**“Well, we appreciate your business, and look forward to earning your trust!**

**Do you have any other questions? Well, thank you for your time, and have a great**

**Day!”**

*(No I didn’t get Your Letter)*

**“I’m sorry; we mailed it to (Specify address). Is this your correct mailing address?”**

*(Yes or no response)*

**“Well, I would be happy to re-send the letter to you. It contains a gift certificate, and is an announcement letter that (XXXX Heating and cooling) has joined (XXXX). We just wanted to let you know and “Thank You” for being a valued customer.”**

*(Listen)*

**“I’ll send it out to you right away. Thank you for your time, and have a great day!”**