

Past-Customer Email Planner

A list self-check, then a fill-in plan for your first four owner-voice emails. It works in whatever tool you already have: Klaviyo, Mailchimp, Constant Contact, HubSpot, MailerLite and others. Print it, grab a pen, and keep it by the register.

How to use this. Part 1 takes a few minutes inside your own email tool or CRM. Rough answers are fine. Part 2 is the back-of-the-envelope math. Part 3 is the plan itself: one email a week for four weeks, each with a topic, an offer, a unique code and a send date. Part 4 is where you write down what came back. You do not have to switch tools for any of it.

Part 1: Is the list dusty or dead?

Most shops do not have a dead list. They have a dusty one. Dusty means real past customers, weak or missing recent sends, an unknown bounce rate, and no clear tracking. Dead means bought lists, scraped addresses, role accounts, and years of neglect with no relationship underneath. A dusty list can earn. A dead one cannot.

Where do past customers live right now? (check all that apply)

- ☐ Mailchimp
- ☐ Klaviyo
- ☐ Constant Contact
- ☐ HubSpot
- ☐ MailerLite or other email tool: _____
- ☐ ServiceTitan
- ☐ Jobber or similar field CRM
- ☐ QuickBooks customer export
- ☐ POS or register export
- ☐ Spreadsheet

The six-line self-check

Question	Your answer
1. Last send. When did the last email go to past customers? If you cannot find one, write that down.	
2. Real people. Roughly how many names are people who actually paid you?	
3. Bounces. Are hard bounces still sitting on the list? (yes / no / do not know)	

4. From-name. Does mail come from a person at your shop, or from a no-reply address?	
5. Codes. Did your last offer carry a code you could tie to an order?	
6. Approval. Who approves copy at your shop, and how fast can they say yes?	

Size band (count real past customers, not every row)

- ☐ Under 250
 ☐ 250 to 499
☐ 500 to 1,999
 ☐ 2,000 or more
☐ Not sure yet

About 500 or more real past customers is the usual fit for owner-voice email. 250 to 499 can work when jobs are high-ticket. Under 250 clean names is a hard conversation. A few hundred real customers beat 20,000 dead addresses.

Clean before writing (do these before email 1)

- ☐ Remove hard bounces and obvious junk.
☐ Look for role accounts (info@, sales@, office@) and duplicates.
☐ Make the from-name a real person at the shop, not no-reply.
☐ Point the reply-to at an inbox someone actually reads. Whose? _____
☐ Do not blast thousands of cold rows to "warm them up."

Part 2: The math you run before the first send

Use your own numbers. The question is simple: is one typical job worth more than a month of emails? Answer it before you spend a weekend writing.

Line	Your number
A. Real past customers on the list (from question 2 above)	
B. Share you think might take a seasonal offer (your guess, as a percent)	
C. Jobs that would mean (A times B)	
D. Your average job or order value	
E. What those jobs would be worth (C times D)	

F. What one month of emails would cost you in time or money	
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Illustrative only, not a promise: the site's worked example uses 1,800 past customers, 2% taking a seasonal offer, and a \$3,800 average job. Your numbers will differ, and line B stays a guess until the codes come back.

Part 3: Plan the first four owner-voice emails

One email a week for four weeks. Keep each one short. It should sound like the person who did the job, go only to people who already paid you, and carry one offer with one unique code. Count orders placed within 14 days of a send toward that email's code.

Topic prompts (pick one per email, or write your own)

- ☐ A job you just finished. Subject in that style: "the garage we finished on Tuesday."
- ☐ A seasonal reminder for the service people forget between jobs, like the tune-up they meant to call about.
- ☐ A quote that sat. A short note to people who asked for a price and went quiet.
- ☐ One thing you changed at the shop this month, and why.
- ☐ A plain thank-you with one offer attached for the next visit.

Code rules for the whole run

- ☐ One unique code per email. Never reuse a code across two sends.
- ☐ Easy to say out loud on the phone, easy to type at the register.
- ☐ Whoever takes orders knows to write the code down. Name: _____
- ☐ Codes get recorded here (invoice note, POS field, notebook): _____
- ☐ If tracking is not in place by send day, the send waits.

Email 1 of 4

Send date: _____ Approve-by date: _____

Topic (one sentence, in your own words):

The offer (one offer only):

Unique code: _____

Code valid through (send date plus 14 days):

From-name (a person):

Approved by: _____

Email 2 of 4

Send date: _____

Approve-by date: _____

Topic (one sentence, in your own words):
_____The offer (one offer only):

Unique code: _____

Code valid through (send date plus 14 days):
_____From-name (a person):

Approved by: _____

Email 3 of 4

Send date: _____

Approve-by date: _____

Topic (one sentence, in your own words):
_____The offer (one offer only):

Unique code: _____

Code valid through (send date plus 14 days):
_____From-name (a person):

Approved by: _____

Email 4 of 4

Send date: _____

Approve-by date: _____

Topic (one sentence, in your own words):
_____The offer (one offer only):

Unique code: _____

Code valid through (send date plus 14 days):
_____From-name (a person):

Approved by: _____

Send-day check: five lines

Run this the day each email goes out. One no, and the email waits.

Check	Email 1	Email 2	Email 3	Email 4
Reads like the owner said it out loud, not like a corporate newsletter				
Goes only to people who actually paid you (no bought or scraped names)				
From a real person, with a reply-to someone reads				
One offer, one unique code, and the register knows the code				
Approved in writing by the person named on the plan				

Part 4: What actually happened

Opens are a soft signal. Apple Mail Privacy Protection often counts an open when nobody read the email. Track what means money instead: replies, booked jobs, and orders that carried the code within 14 days of the send.

Email	Code	Sent on	Replies	Booked jobs	Coded orders (14 days)	Dollar value of coded orders
1						
2						
3						
4						
Totals for the four-week run						

Notes after email 4

Which topic got replies? Which code came back? Did a customer write something you could use in email 5?

Rather have it written and sent for you? The 4-email pilot is the same four weekly emails in your voice. You approve each one before it goes out, and every email carries a unique code. You pay 10% of orders placed within 14 days of a send, with a floor of \$600 to \$1,200 based on list size, set in writing before the first send. If tracking is not in place, we stop. You keep your email tool and your list. Send your six self-check answers and your size band to john@emailmarketingkc.com, or call (816) 300-1791.

Email Marketing KC | emailmarketingkc.com | (816) 300-1791 | john@emailmarketingkc.com | Kansas City, MO
Owner-voice emails for shops that already have customers. Same email work inside any provider (Klaviyo, Constant Contact, MailerLite and others) using your login. This planner is a worksheet, not a promise of any result. Your numbers will differ.