WORKWAVE®

INCREASE SALES AND RETENTION WITH 12 MONTH INSTALLMENTS

How we migrated 85%-90% of our customers over to 12 mo installments

BEYOND SERVICE
CUSTOMER CONFERENCE '26

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INCREASING SALES AND RETENTION WITH 12 MONTH INSTALLMENTS

Ben Molitor

CEO, Best Lawn Care

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RealGreen SYSTEMS

Connected by Real Green

Private group · 1.1K members

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HISTORY OF INSTALLMENTS/MONTHLY BILLING

- Started in 1800s, in Europe local King let his people pay a monthly fee for electricity/utilities
- 1800s-1900s was singer sewing machines, it dramatically expanded sales
- Early 1900s moved to any larger items, pianos, furniture ect
- Big leap into the automobile industry
- Eventually home mortgages
- late 1950s came the credit card buy now pay later

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Blockbuster Vs Netflix

- Anyone heard of blockbuster
- $800m year in late fees alone

- Netflix? had a new idea of fixed monthly fee for dvd rental
- Little to no late fees, i think they would just charge the dvd
- Netflix went to blockbuster to partner with them for their online division and they laughed at the netflix founder

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Who Here Utilizes Monthly Payments?

- Who has monthly payments besides car/home
- Electric service
- City water
- Trash
- Neflix, Amazon, disney, HBO, HBO Max, Hulu, paramount+, peacock, youtube, apple tv. Keep going (many have levels too)
- HVAC, My company is $18mo
- Lawn care
- Pest control

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Who Here Utilizes Monthly Payments cont

- The big companies realized this early on and switched to monthly
- Gyms !!!!! who here pays for that but never goes?
- Microsoft live, remember paying 1 large fee and waiting for cd so you could update OS? windows 95
- Adobe, all the SaaS companies
- Zendesk, Canva, Slack
- Almost all online companies have a monthly subscription
- Why are you not doing the same?

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What Do You Name It?

- Installments
- Monthly Billing
- Budget billing
- 12mo EZ-Pay billing
- Fixed monthly payments
- Payment schedule
- Monthly rate
- Monthly invoicing
- Monthly service plan
- Set it and forget it billing

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WHAT YOU CALL IT MATTERS

Other options besides calling it installments are:

- EZ Pay BIlling - we use this
- Equal Monthly Billing
- Budget Friendly Billing(BFB)

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Benefits of EZ-Pay to the customer

- Customers buy more services and pay higher price when:

  - Smaller monthly price instead of a large yearly price
  - Customers like to budget
  - Think about when a customer is calling you for services and they ask if every app is same price? that price include FAL?...no....
  - People are used to paying a monthly fee from all other companies mentioned previously they are conditioned to it now
  - They can add more services and get more value on their property

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Benefits of EZ-Pay to the customers

- We AVERAGE…..4 line items on all new sales
- It starts with your sales process
- No double charges for multiple services done at the same time
- Convenience to customer, never need to remember to make payment. Never miss a service.
- The more services you can do on one stop the more your hourly revenue goes up and the more profit you make

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Benefits of EZ-Pay to the business

- Predictable MRR (Monthly Recurring Revenue)
- Better forecasting
- Higher Customer Lifetime value, More services $7.14 upsell.
- Lower churn rates
- Lower Collections
- Improved Customer retention
- Higher business valuation multiples
- More resilient in downturns like covid
- No pre-pay 3-7% discount that goes right back to bottom line

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Option #1 EZ-Pay Billing

- 3 Main ways to do this in SA5 based on limitations
- #1 Simply take however many services and whatever $$ is left in that service year and divide it by however many months are left in that season.
- 4 apps left at $50 per app $200 left for year and its Aug so 5 mo left, pick the next closes date. 1st or 15th $200/5=$40mo
- however now the next month is Jan what is their monthly going to be? This gets confusing for customer
- Video click to watch

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Option #1 EZ-Pay Billing Cont

#1 For January you'll add all the services they had skipped the previous year. the total is $670/12= $55.83mo

Now the customer is little confused why their monthly price went up $15.83mo. This is why we don't use this model.

However, we do use this for higher priced services like Core, Seeding Starter Fert package $867 that are added on or upsold to account after feb 28th. We create a 2nd installment plan and have this plan end on Sept 30th, We also keep payment on same date as regular installment plan, to keep cc batch same

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Option #2 EZ-Pay Billing

#2 This is how we do it and think its best way for the ease of the customer, and renewals.

- It all starts with the sales process. We start by probing questions about what the customer goals are. Most time leads to 7-step program $411.60, grub protection $84.15, Irrigation $210, Mosquito & Tick $319.44
- Customer starting in June, so 2 apps of LC & Mosquito have already passed.
- Card on file, you never have to remember to pay invoice
- Paperless
- Customer starting June with first 2 apps skipped click to watch

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Option #2 EZ-Pay Billing Con't

- As soon as we answer sales calls we are already looking at what that days date is, today is the 3rd so we know we will tell customer that first payment will be today and the next recurring payments will be on the 15th of each month after that. If the 17th then recurring is on 1st. renewals tight.
- When adding new services through the year, then you'll pay for the service at that time and then next Jan we will roll that service into your EZ-pay. Services continue season to season. We contact you in Dec of every year to let you know if your monthly price will be changing for the next year.

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Benefits For Why We Do It This Way

- We do not set up accounts in the assumption that they are going to cancel after Dec
- Same monthly price every month, even after renewals
- Simple to the customer
- No PP discounts to give away
- If they add a service mid season we charge them day of service (or PP no % off) and let them know that we'll roll that service into their monthly starting in January
- Upsells are really easy. upsell a $89.65 grub for $7.41mo

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Option #3 Please DONT Do This!!

- # 3 way to do EZ-Pay is just like #2 only its a true 12month.
- You'll have to have 12 flag codes (or 24) for each month of the year, and do renewals 12x a year if you only do one day a month, like the 1st.
- Or you have to do installment renewals 24x a year if you do two days a month like the 1st and the 15th.
- Sometimes called a "rolling 12 mo billing"
- Dont do this!!....

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Adjusting An Active Installment

- This can get confusing so just hang in there
- YOU WILL HAVE QUESTIONS!!!

- Cust adding new service after payment has been made click to watch

- Cust cancelling 1-2 service but keeping service Click to watch

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Canceling/A An Instalment

- The goal is to never have a customer cancel right??
- But it happens, sometimes you owe them refunds and sometimes they still owe you money, Its very important that you talk about this on your initial **RECORDED** sales call as well as having a lot of this in your T&C
- Vid of cancelling a service click to watch

- Basic canceling instalments click to watch

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CANCELING A CUSTOMER

- Check **Installment Detail Summary** to find Credit/Remit

- Let customer know that with EZ Pay Billing, depending on when you signed up and what we have serviced the company may owe the customer or the other way around.
- Terms and Conditions

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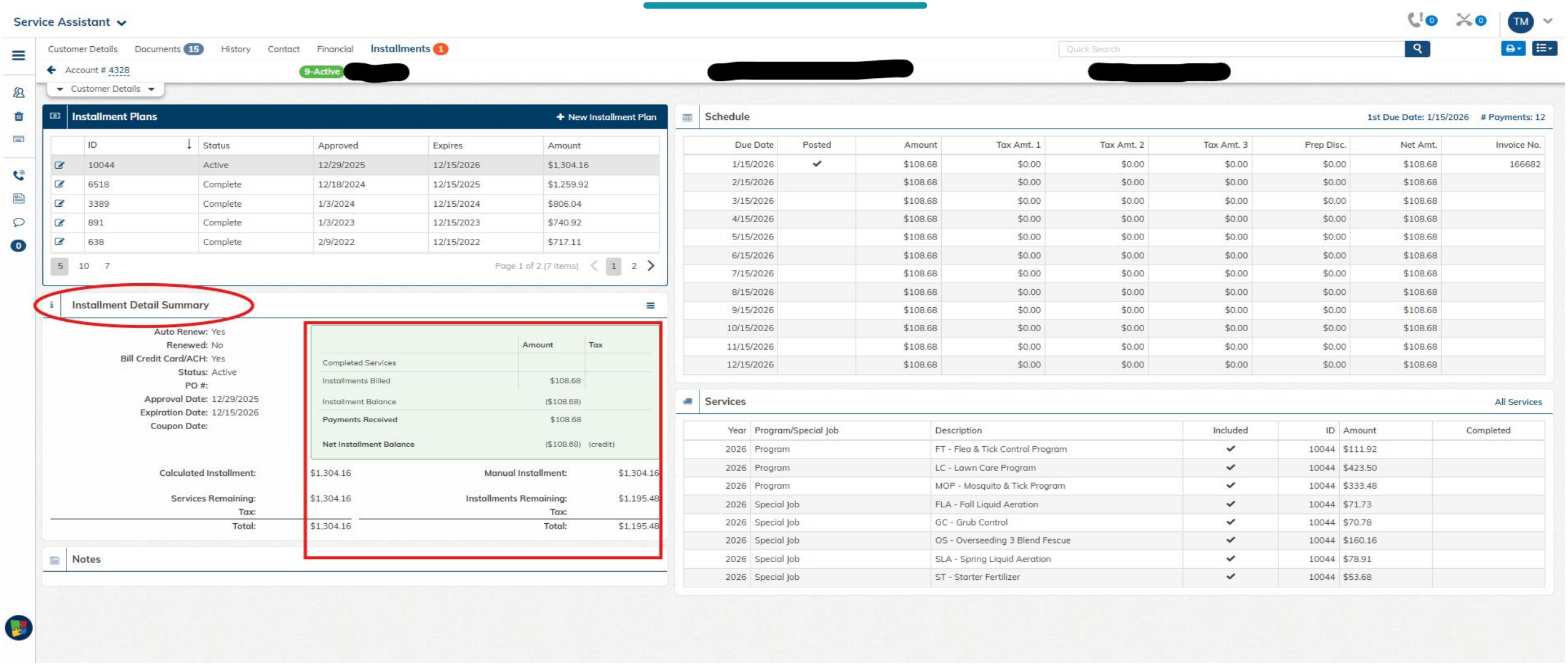
CANCELING A CUSTOMER



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End Of Year Renewals

- Renew all services like RG says to in the year end procedures.
- Do price increases. Then do instalment renewals by flag code. Use the installment utilities to filter manage and search for installments that might not have ended onthe 1st or the 15th.....

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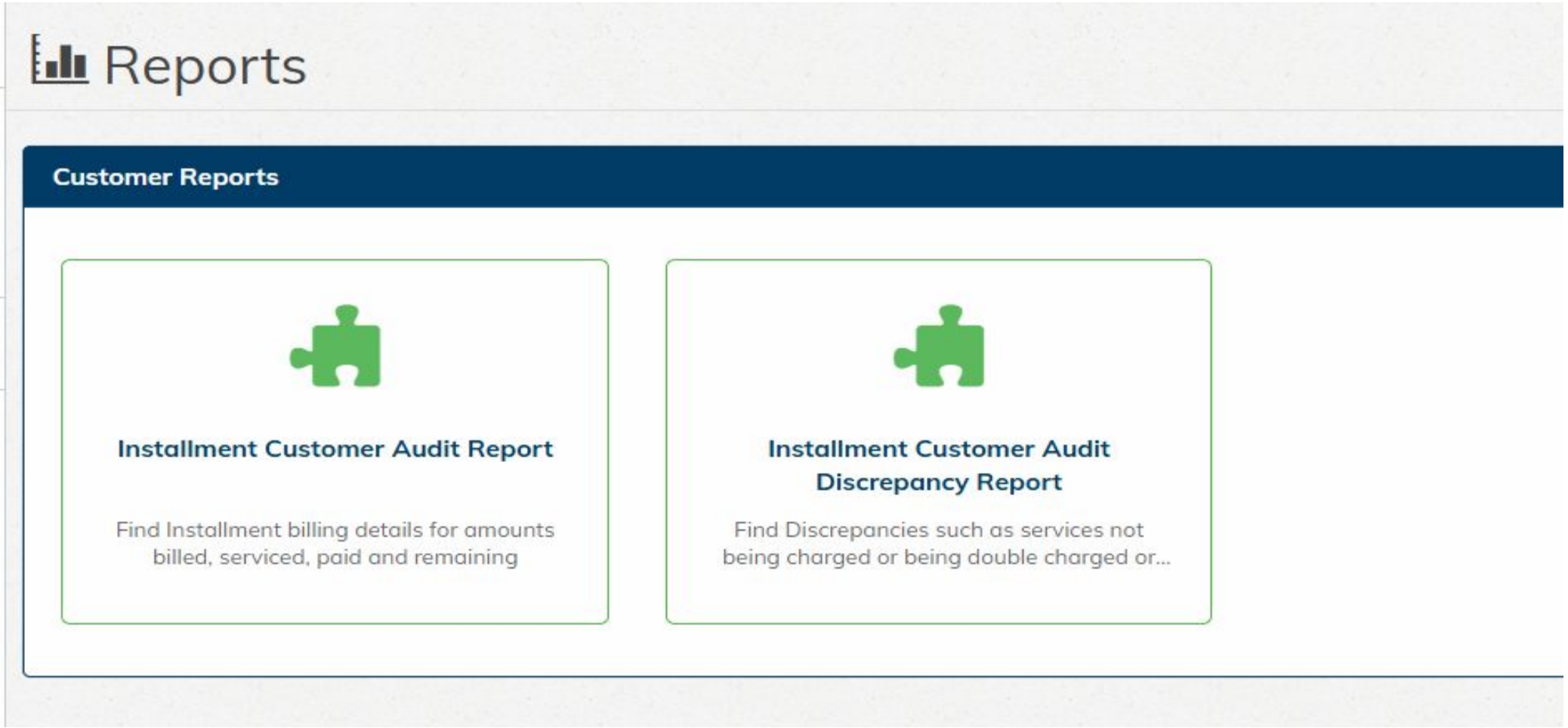
Instalment Reports



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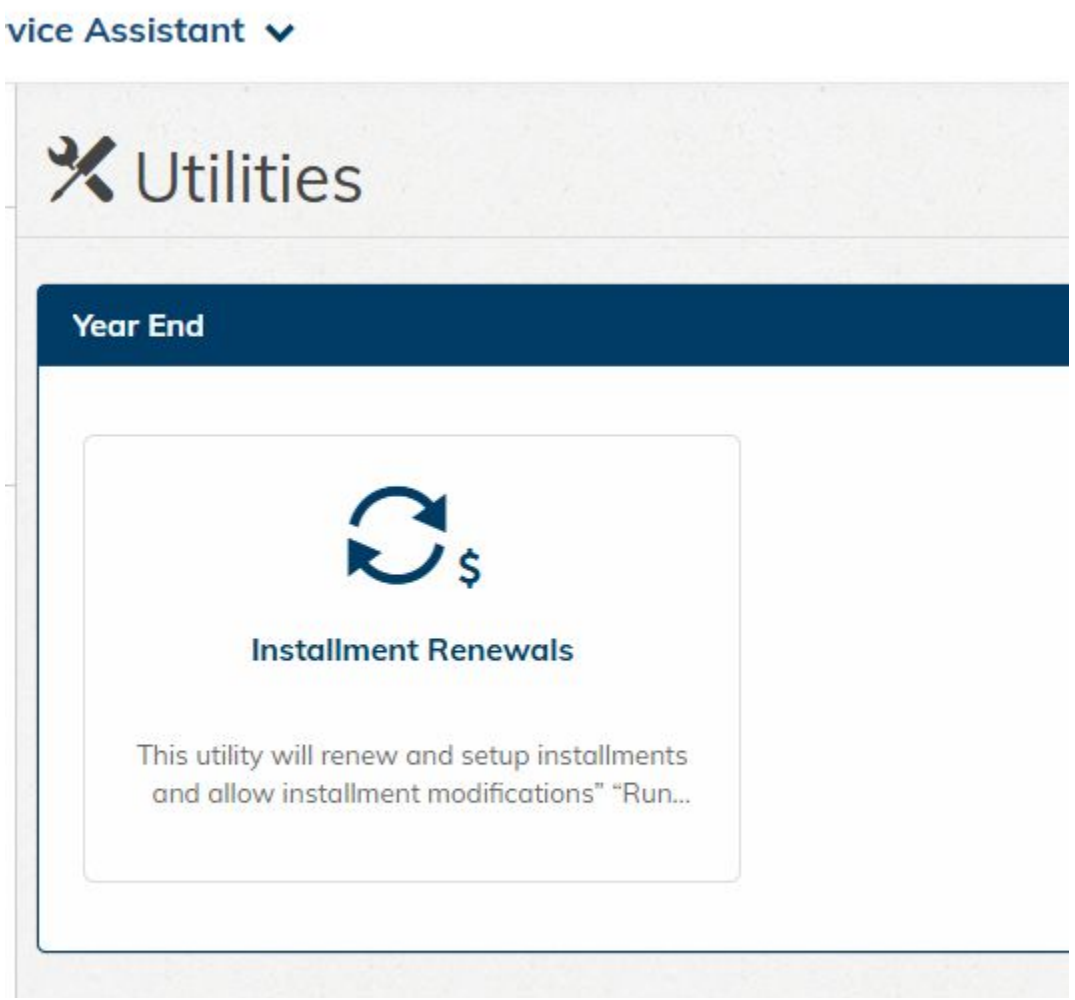
Instalment Renewals



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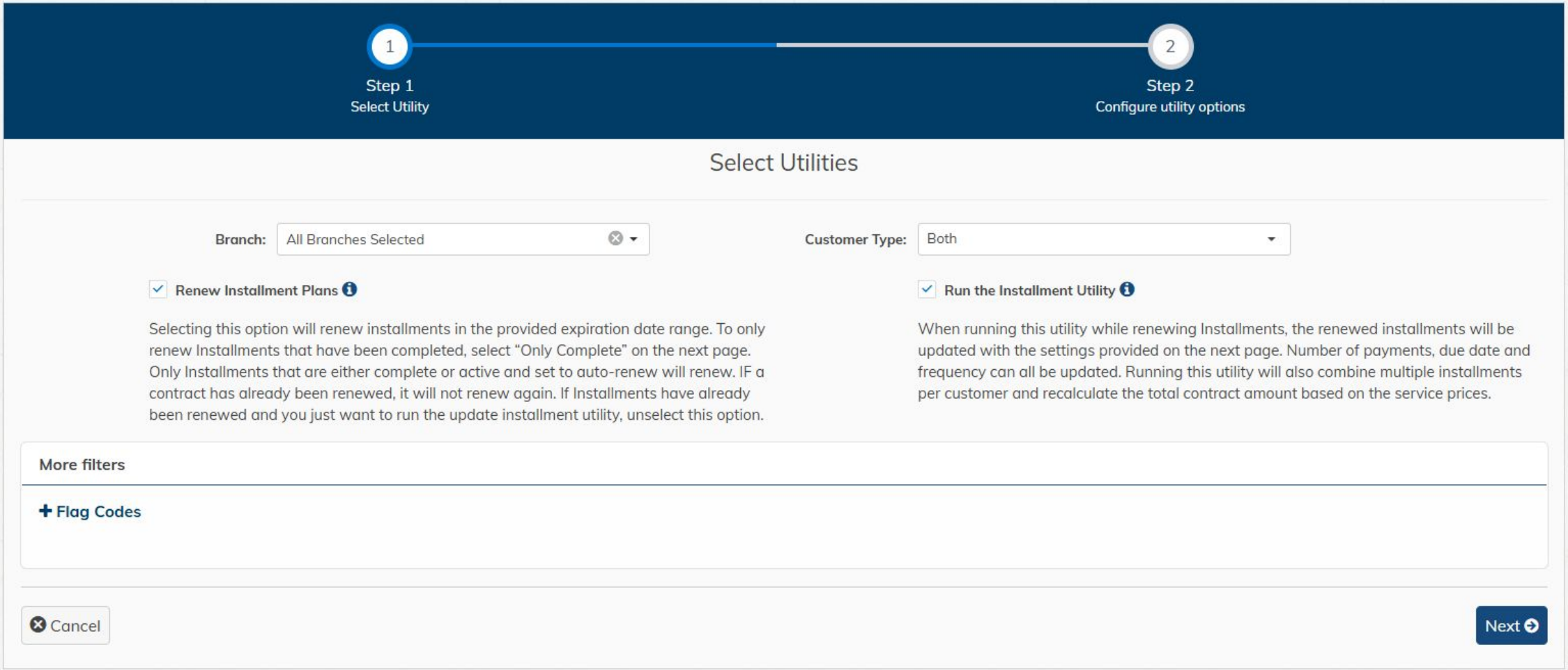
Instalment Utilities



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live demo ?

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Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

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Questions?

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