



Agenda Day 1

- Opening Remarks and Agenda Review – Gary Elekes – Marketing
- Seminar Objectives, Expectations and Materials for workshop
- Marketing Fundamentals Defined
 - Overview of Traditional Marketing versus Marketing for Contractors
 - External Media vs Operational Marketing vs Internal Marketing

Break

- GAP ANALYSIS on Marketing for each Company – Setting Priorities
- Define your Main Company Goals – Specific Company Goals
- Define your Company Marketing Goals that Support Company Goals
- Marketing Plan Defined – The Marketing Plan with Definitions of all Strategies in Trades
- Establishing a Campaign Strategy and 12 Month Calendar – How to Define the Shoulder Season

Lunch Break

- Overview of various marketing strategies – TOP 15 Strategies
 - Selecting Strategies to Support Marketing Execution
 - Developing Action Plans for top 5 prioritized company goals

Break

- Introduction To *Internal Marketing – Defining the ACTION Priorities*
 - Servant Based Leadership
 - Internal Communications and Culture – Defining for Employees
 - Training Platform
 - Identify skill sets required
 - Testing
 - Creating a Training Program
 - Performance Expectations – Defined Measurements and Role descriptions
 - Performance Evaluations
 - Setting Company Standards
 - Customer Feedback and Employee Feedback



Day 2

- **Recap and Review – day 1 and homework setting priorities and outlining plan**
- **Operational Marketing - Marketing Your Company Better -How to Implement & Execute Strategies**
 - **Growth Targets - Target Marketing – Choosing ROI Targets for Marketing Practices (Model)**
 - **Marketing to Existing Customers versus New Customers – Mix of Leads**
 - **Establishing a Marketing Budget (ALL)**
 - **Internal – Operational – External**
 - **Align these with your business model – your goals- your strategies – your targets for growth**

Lunch Break

- **External Marketing - Marketing Plan Synergy – All Aspects of Your Company Marketing Working Together**
 - **Establishing Your Brand - Attributes**
 - **Establishing Your Unique Selling Proposition**
 - **Establishing Advertising Objectives tied to Campaigns**
 - **Establishing Lead Tracking -DATA and Data tied to CPL, Conversions, Tracking & Measuring**
 - **Evaluating Advertising Effectiveness – ROAS, ROI**
 - **Determining Lead Requirements and Assigning Responsibility**
 - **Internal Lead Generation Process**
 - **External Lead Generation Process**
 - **Choose Advertising Mediums to Maximize the Number of Leads**
 - **Research for Mediums**
 - **Demographics and Evaluating Media Choices by Data**
 - **Creating an External Media, Promotions & Advertising Calendar**
- **Marketing Materials - Supporting Your Marketing Plan**
 - **Marketing for Service Leads**

Break

- **Marketing – How Does Pricing Fit / Pricing Strategies**
 - **Pricing Fundamentals**
 - **Service Labor Rate and Establishing Street Rates - Exercise**
 - **Flat Rate Versus Time and Material**
 - **Club Agreements - Service Agreements**

- Growing Service Agreement Customer Base
- Commercial & New Home – Dual Overhead Strategies
- Residential Replacement
 - Engineered Jobs Versus Menu Pricing – GP\$ Per Man –Day Requirements
 - Price Positioning Strategies and Why
 - Breakeven Strategies & Discounting Practices for Labor Management
- Service Agreement Approach and Lead Generation for Replacement
 - Types
 - Strategy
 - Metrics and Standards
 - Operational Formula
 - Technician Training Model, Compensation & Productivity

Day 3

- **Develop Business Processes to Support Marketing Plan**
 - **Service Agreement Program / Support Material**
 - **Demand Service / Support Material**
 - **Flat Rate Program / Support Material**
 - **Technician Sales Lead Turnover / Support Material**
 - **Repair vs Replacement \$5K Rule for Conditional Sales Processes**
 - **Repair Versus Replacement**
 - **Over 10 Program and promotional strategies**
 - **Selling Processes / Support Materials**
 - **Presentation System**
 - **Lead Coordination and Marketing Actions**
 - **Website - Sales Support Material**
 - **Referral Programs**
 - **Builder Database – Use the Builder database to grow**

Break

- **Advertising & Media Tips for Contractors**
 - **Advertising Mediums and Media Planning**
 - **AI – Using AI to refine Target Audiences**
 - **OTT TV and RADIO - Broadcast Mediums**
 - **Print Mediums**
 - **Direct Marketing Mediums**
 - **Outdoor Reminder Mediums**
 - **On-line Marketing – Website, Social Media, Email, Texting, OTT, AI, Paid, GMB**
 - **Public Relations**
 - **Special Events Marketing**
 - **Sales Collateral Materials**
 - **Collateral Materials**
 - **After the Sale Follow-Up Operational Process – Happy Calls**
 - **Consumer Promotional Items**

Lunch Break

- **Designing Creative For Effective Ads**
- **Direct Mail Do's and Don'ts**

Break

Finalize Your Company Marketing Plan

- Executing the Marketing Plan- Project Plans
- Closing Comments

Final Day Closes at Approximately 2:30 PM
You will be tired by then anyhow!