

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!