



Marketing Playbook

FOR SMALL BUSINESSES



Congratulations!

**YOU'VE TAKEN THE FIRST
STEP IN STANDING OUT
AMONG THE COMPETITION.**

This playbook provides practical, actionable tips in developing and maintaining your online presence and developing an effective telemarketing solution. For more than 70 years, Cole has helped businesses like yours find new customers.

SOCIAL MEDIA

Be part of the conversation

Social media is no longer just for keeping up with long-lost friends from High School. Social media, when deployed correctly can be a major tool in your marketing. Short and long form content like reels, blog posts and videos are easily consumed and shared, giving you numerous ways to engage new and existing customers.

WEB MARKETING

Nurture your website

Social media is essential to your online presence, but don't forget about managing and refreshing your brand. When was the last time you updated your website content or explored pay per click ads?

You can easily uncover ways in which consumers are finding and engaging with your business without hiring an IT specialist - take advantage of low-cost tools from Google, Yahoo and Microsoft for insights on page performance; keywords that drive traffic clicks; and consumer dwell times. Investing a little energy into understanding how customers interact with your site provides invaluable insight when it comes to maintaining relevance!

Pay Per Click

It happens whenever you search the Internet. You type a word or phrase into a search engine, hit enter and immediately "sponsored" ads of local businesses pop up below and to the right of the screen. These sponsored links or ads are known as pay per click marketing and when done correctly, can create awareness and generate leads to your website.



Develop a **MARKETING PLAN**



Growing your business involves attracting new customers and retaining your current ones. A solid marketing plan can help with both and saves time, money and preparation. When developing your marketing plan, spend some time and think of your ideal target audience, your direct competition, your budget and what makes you stand out from the competition.




01. GOALS

What do you want your business to accomplish?

02. STRATEGIES

How will you reach your goal? Will you use advertising, direct mail, social media, giveaways, etc?



03. CAMPAIGN

How will you use your marketing dollars wisely?




04. TIMELINE

When do you plan to launch your campaign? Even if you don't follow your timeline, developing deadlines can help you reach your goal.



05. MEASURE

What was your ROI for each campaign? Was the cost worth the time, manpower etc. associated with it?





MARKETING IN ACTION



Social Media

- Spend some time developing and cultivating a presence on one or more social media sites.
- Poll your customers and find out how they use social media.
- Generate leads, grow business and improve your company's bottom line in just 10-minutes a day.



Web Marketing

- Develop a keyword strategy: Words or phrases that sum up your product/service.
- Incorporate those keywords into your website.
- SEO: Search engine optimization refers to using industry specific keywords on your website and social spaces to increase your search engine visibility.
- Monitor what's being said about your business, brand or industry. Make changes based on this valuable feedback.



RESOURCES

- website.grader.com
- adwords.google.com
- googlekeywordtool.com
- advertising.microsoft.com
- google.com/analytics
- google.com/alerts



DIRECT RESPONSE

Does it work?

To be successful, direct marketing needs to get the right message to the right people. By testing and tracking to find the right message, and using highly specific targeting technologies, direct marketing can grow your small business.

TRADITIONAL AVENUES



01. DIRECT MAIL

Direct mail continues to be an effective marketing strategy that 80% of American consumers engage with everyday. It is most effective when it's personable.



02. EMAIL CAMPAIGNS

Email campaigns on a regular basis to your customer base can be effective at keeping you at the top of consumers minds. Be sure to include news about your product or service, tips or tricks.



Tips for success




01. Consistency

To make an impact, research reveals that your clients need to see you seven times. Ensure that all of your advertising is cohesive and in line with the identity of your brand - use a consistent tone, colors, tagline etc., so they recognize it when they come across it again.


02. Unforgettable

As an expert in your field, you have the ability to deliver more value to homeowners with expert knowledge. For example, create custom tip sheets on ideas for a more energy efficient home, which could be especially useful. Also consider creating magnets with your contact details along with schedules of local events - something people are likely to hold onto handy in their fridge.


03. Call To action



Give your prospects a reason to call within a certain timeframe. For example, if you inform a prospect by postcard that Halloween is approaching in October, include in the mailer, "Order/Schedule by October 15th to receive your exclusive discount." Then follow up by phone a few weeks after you sent the mailer to ensure they received it, have any questions or want to make an appointment.



Don't bite off more than you can chew.



For example, if you're sending out direct mail, try sending 50 postcards per day. Use the revenue generated from that campaign to fund the next one. As more revenue is generated, you can send out more direct mail pieces. Just don't dive in all at once.

MOBILE MARKETING

01. QR Codes

QR codes can be an excellent way to add online interaction to your print marketing campaign. Make it easy for people to engage with you: give them instructions on how to access the QR code:

1. Open the camera app on your phone
2. Select rear-facing camera
3. Hold your device so the QR code appears in the viewfinder
4. Follow the link

02. Text Messages

Another way to gain consumers' attention is through text messaging. Who doesn't send and receive texts? At only 160 characters, the open rate on text averages 97% and many times, the short message is read within four minutes. Using SMS marketing software and a keyword that fits with your business and promotion, you can successfully implement a SMS campaign to text promotions or coupons to your customers and prospects.

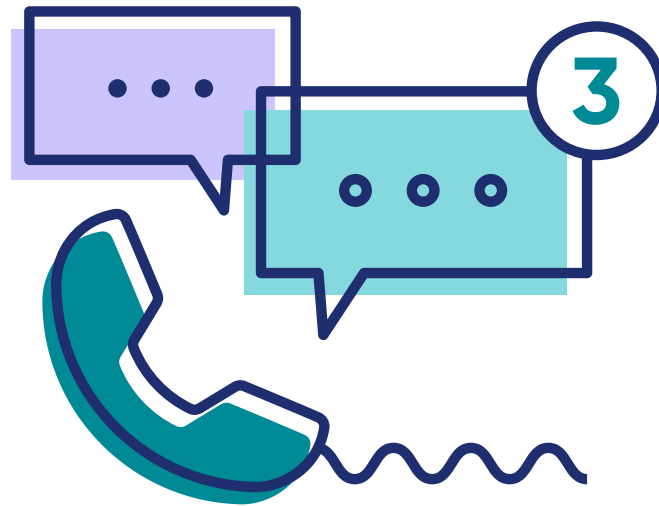
TEST. MEASURE. REPEAT.

There is no magic formula that will tell you how to do your direct marketing campaigns. But you can statistically determine what works best by tracking the response rates when using different images, copy and offers.

A good rule of thumb is to test two different versions of your mail piece by sending each version to 10% of your prospects. Send whichever gets the better response to the remaining 80% of your prospects.

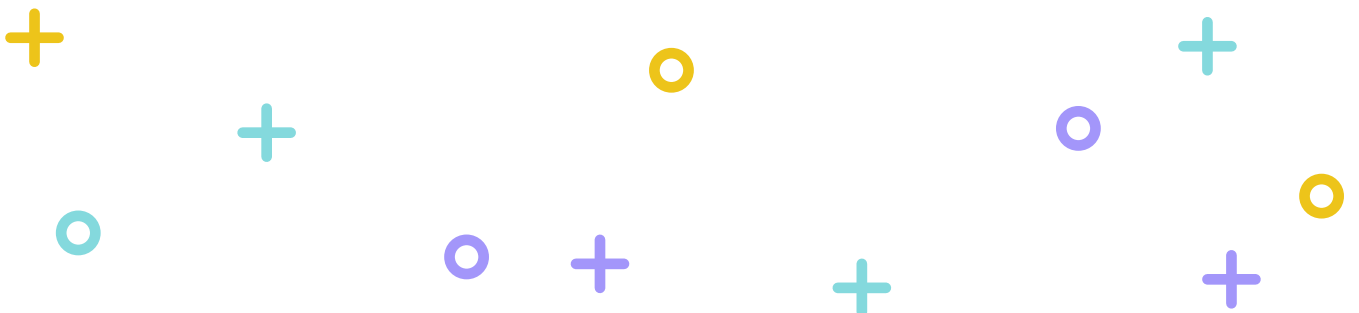
It is important to review all texting compliance regulations before conducting text campaigns.

TELEMARKETING



Does it work?

Cold calling a random group of people usually wastes your time and resources. Rather, to implement a successful telemarketing campaign, call the right people at the right time.






CALL THE RIGHT PEOPLE

01. Referrals

Your customers can be a valuable resource when it comes to expanding your business. All you have to do is ask – a simple conversation or a wish for a happy birthday and invite for them to recommend someone they know, could turn out the best contacts of all. Referrals are proven revenue generators that come with an advantage – your customer has already established trust with their recommendation leaving one less barrier for doing business together.

02. Targeting

By examining your most successful customers and analyzing their demographic characteristics, you can gain valuable insight into the ideal targets for your services. Researching factors such as age, geographic location and home value can assist in pinpointing exactly who to focus on when marketing – saving time and money while optimizing profit potential.



To attract new customers and grow your business, look no further than those who resemble your best customers.



CALL AT THE RIGHT TIME

You can't predict when a homeowner will need home services. As an industry professional, it's on you to be in the right place at the right time. Timing is everything. Focusing on targeting prospects when they're most likely thinking about making a purchase rather than when you want to sell is key to being successful.



Think about trigger events which cause people to think about your business.





DO NOT CALL REGISTRY (DNC)

The National Do Not Call Registry allows US consumers to register their phone numbers to limit the number of telemarketing calls they receive. It was put into effect in 2003 by the Federal Trade Commission (FTC), and made it illegal for businesses to call prospects who had registered their phone number on the list.

(This excludes customers. For other exceptions or details, go to www.donotcall.gov.)

SUBSCRIPTION ACCOUNT NUMBER (SAN)

SAN is an identification number indicating a yearly subscription to the DNC registry. Any organization that uses the telephone for consumer prospecting must register with the FTC and receive a SAN. Your SAN is free for up to five area codes.



Essential messages

When making phone calls for your telemarketing campaigns, try using different wordings, messages and offers. Keep track of how different messages perform. A simple tally will help you identify which message works best. You can then use that message on the rest of your calls.



Something you should include in all of your scripts is that you are located right in their neighborhood. You know the area. You care about the community and your customers. This will help prospects relate to you and trust you.



GETTING STARTED

01. Overcoming objections

Inevitably, prospects will have objections. When it comes to overcoming objections, you have a number of effective solutions available. Rather than attempting crafty manipulation techniques, take the time to truly understand what they need and how you can best meet that demand - be flexible where necessary. Utilize your in-depth knowledge of both products and services; by taking this approach you ensure success for everyone involved.

02. Following up


Whether it's because of forgetfulness, laziness or fear of appearing pushy, many people do not follow up with their prospects. Even those who do follow up do so "just to touch base." Calls should be made with purpose; state the purpose of yours. This is a great opportunity to differentiate yourself from other businesses. You care. You are different. Take the initiative.





MARKETING SCHEDULE

You're already busy with all the responsibilities that come with running your business. Making sure your marketing plan is organized can save valuable time and energy in the long run. To get started on this front, consider creating a detailed schedule: Excel works wonders here! Plan out all advertising, and public relations activities as well as referrals, and social media initiatives for either one quarter at a time or even up to an entire year if needs be - seeing it physically written down will give you extra motivation to stick to it.








Here are two more tips for being strategic and intentional in your marketing:

01. Schedule Your Phone Calls.

Scheduling sales calls, or follow-up calls, in advance helps avoid prospects falling through the cracks (not to mention taking the strain off your memory). For sales, make a selling schedule, or dedicate an hour each day to making sales calls. For follow-ups, try updating your Outlook appointments with the next time you plan on calling your prospect as soon as you get off the phone with them. That way you won't forget.

02. Strategically Manage Your Time

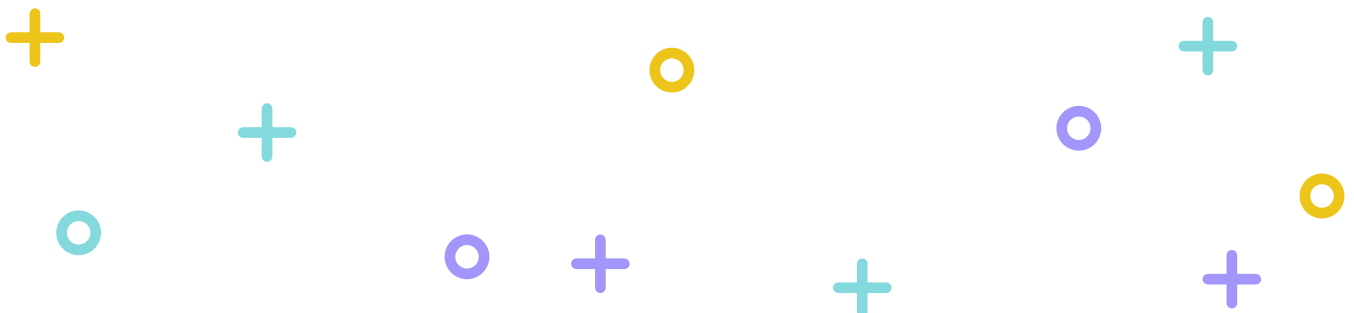
There is a difference between being busy and being productive. Manage your time in a way that you spend it being productive. Do the things that will pay off. Determine your priorities, then manage your time accordingly. Your marketing schedule and scheduling your phone calls will help tremendously in time management.



EXAMPLE SCRIPTS



These scripting ideas are a product of our interactions with sales professionals over the years. It's important that you take these ideas and make them your own.



01.

"I just saved (name) some money on their (product). He's a good customer of mine and he recommended I call you to see if I could save you some money as well."

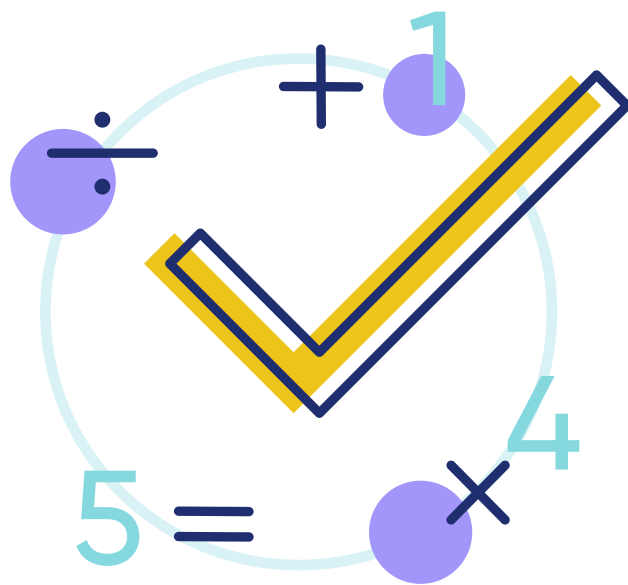
02.

"Hi, I'm (your name) with your local (industry). We've been serving the (city, county, etc) area for over (x) years. If you are thinking of buying (product) soon, we'd love the opportunity to provide you with a free estimate and show you how we could save you money."

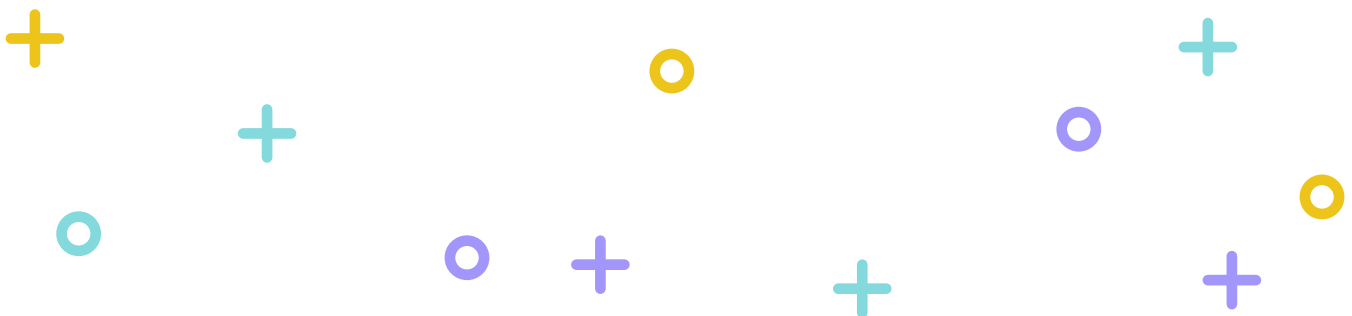
Other useful sentences to try

1. "If you haven't had your (product) reviewed in a few years, we could help you out with that as well."
2. "We just saved your neighbor (name) some money on his (product), and we thought we could save you some, too."
3. "Could I set up an appointment to stop by and prepare an estimate for you? I think we would be able to save you some money."
4. "Would there be a good time when I could ask you a few questions to prepare your free quote?"
5. "I currently have (product) in (x) homes in your area..."
6. "Would it be OK if I sent you an estimate?"

CALCULATIONS FOR SUCCESS



Tracking performance is vital in operating a business efficiently. Here are some quick calculations that will help you track your performance in order to find what works and what doesn't. Then you'll be able to do more of what works based on your own results.



01. Close Ratio

Close Ratio is a calculation used to determine your effectiveness in completing a sale.

It is calculated as follows:

$$\text{Close Ratio} = (\text{Number of Sales Leads} / \text{Number of Sales}) \times 100$$

For example, let's say you called 50 leads last week, and of those leads, you closed (or made) sales. That means your close ratio was:

$$(50 / 5) \times 100 = 10$$

That means the close ratio on your phone campaign was 10%. The same calculation can be made for visitors to your business, your website, etc.

02. Return on Investment (ROI)

ROI is an important calculation used to determine how effective an investment is.

It is calculated as follows:

$$\text{ROI} = [(\text{Revenue Generated} - \text{Initial Investment}) / \text{Initial Investment}] \times 100$$

For example, if you spent \$500 on a direct mail campaign which generated \$700 of revenue for you, it would be calculated as:

$$\text{ROI} = [(700 - 500) / 500] \times 100 = 40$$

That means your direct mail campaign had an ROI of 40%. You can use calculations such as close ratio and ROI to track and determine what activities result in higher profits for your business. After determining what results in higher profits, you can do more of that activity, and less of other, less productive activities.

03. Meeting Your Goals

Do you get that panicked feeling towards the end of each month, wondering if you are going to meet your sales goals? Instead of wondering if, make a plan on how you are going to meet your goals. After tracking your close ratio for a few months, you will come up with a fairly reliable average for your business. You can plug that number, along with your sales goal into the following formula to calculate how many phone calls you should be making to meet your goal.

$$\# \text{ of Phone Calls} = (\text{Close Ratio} / 100) \times \text{Sales Goal}$$

For example, let's say you found your close ratio was 12%. And your goal was \$5,000 per month. Then the number of phone calls you would need to make in order to meet your goal that month would be calculated as follows:

$$\# \text{ of Phone Calls} = (12 / 100) \times 5000 = 600$$

That means, to make your sales goal for the month, you will need to make 600 phone calls throughout the course of that month. That may sound like a lot, but when broken up into bite-sized pieces each day (600 phone calls / 30 days), that's only 20 calls per day. Breaking it down will make it easier to make sure you are staying on track to meet your goals.





OUR SOLUTIONS



Cole Information provides powerful solutions for finding quality prospects at a low cost.



Different features and entire products have been developed to help new businesses overcome some of the obstacles previously discussed. For example, Cole Information can help you find the right people, determine the right time to contact those people, target the most profitable prospects and help with DNC regulations.



RESOURCES

Here are some other businesses and resources our customers have found in cost-effectively finding new customers.

Cole Community

Cole customers get access to Cole Community, where you can learn about ways to find new customers, watch videos and sign up for future webinars. Don't forget to check out our blog for more helpful tips to grow your business:

coleinformation.com/blog.

D2D Experts

Door to door sales, leadership, recruiting and sales training from the best minds in the business to simply copy and paste your way to success.

thed2dexperts.com

Contractor Coach Pro



The proven contractor coaching blueprint for growth minded leaders. For high job value home service contractors like roofing, siding, windows, painting, garage floors and doors, bath, and more.


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