Building Profits with Home Performance: Sales & Marketing Bootcamp

Home Performance Coalition
Home Performance with Energy Star
Columbus, OH September 2017
Agenda for the Day

8:30-8:45  
Welcome and Intro: HPC & HPwES

8:45-9:45  
Peter Troast  
Start Here: Evaluating the Current State of Your Marketing

9:45-10:00  
Break

10:00-11:00  
Ed Matos  
Connecting Your Marketing to Sales: It all starts with the phone.

11:00-11:15  
Break

11:15-12:15  
Peter Troast  
Foundations of Your Marketing Program: including your presence on the web

12:15-1:00  
Lunch

1:00-2:00  
Ed Matos  
Defining Your Sales Process: Consultative Education Based Selling.

2:00-2:15  
Break

2:15-3:15  
Peter Troast  
Proven Marketing and Advertising Tactics that Generate Cost Effective Leads.

3:15-4:15  
Ed Matos  
Closing the Business, Driving Referrals and Pipeline Management.

4:15-5:00  
All: Q&A, Commitments, & Closing

5:00-6:30  
Networking at the Conference Reception: A Chance for Participants to Chat Informally w/ Experts
Building Profits with Home Performance: Sales & Marketing Bootcamp

Peter Troast, Founder & CEO
Home Performance Coalition
Home Performance with Energy Star
Columbus, OH September 2017
Founder/CEO of Energy Circle

Linked In: Peter Troast
Twitter: @EnergyCircle
G+: Energy Circle
Facebook: Energy Circle

Volunteer/Pro Bono

Efficiency First Board
Home Performance Coalition
1000 Home Challenge
PHIUS
The Energy Circle Sandbox

340+ High Performance Businesses
  auditors/raters, HP contractors, builders/remodelers, HVAC, non-profits, architects

49* States

6.2 Million Web Visitors

Thousands of Leads

64,000 Tracked Search Terms in HP

$12 million in Google Adwords in HP, HVAC, Insulation

Lots and lots of experiments

$1+ billion in Building Retrofit Work
I

* data.
Part 1 Topics—Evaluating Your Marketing

1. Getting in a Planning Mindset

2. Objective Approaches to Evaluating Your Marketing
   - Financial & Lead Goals
   - Website performance

3. Key Metrics
   - Cost per lead
   - Cost per acquisition
# 3 Key Tools

## Marketing Plan Template

**Situation Analysis**

What worked and didn’t last year? What are the key trends, forces and conditions affecting the business? What are your core marketing challenges—more leads, better conversion, faster ticket growth? How do you stack up against your competitors?

- Prior Year Marketing Evaluation
  - What worked
    - 1
    - 2
    - 3
  - What didn’t work
    - 1
    - 2
- Key Marketing Challenges
  - 1
  - 2
  - 3
- Market Conditions (programs, incentive changes, energy prices, macro economy)
  - 1
  - 2
  - 3
- Competitor (who are they and do you stack up?)
  - Company 1 & core strength
  - Company 2 & core strength
  - Company 3 & core strength

<table>
<thead>
<tr>
<th>Tactics</th>
<th>Impressions/Visits</th>
<th>Cost</th>
<th>Conversion Rate</th>
<th># of Leads</th>
<th>Conversion Rate</th>
<th>Apps or Quotes</th>
<th>Conversion Rate</th>
<th>Jobs</th>
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<tr>
<td>Social Media</td>
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- 232 total

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<td>per site</td>
<td><a href="#">Resource</a></td>
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<td>Incentive Offer</td>
<td>Two Kill-a-Weed closed referral</td>
<td>complete</td>
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<tr>
<td>Referral</td>
<td>Email Marketing</td>
<td>Two Kill-a-Weed postcard</td>
<td>per card</td>
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<td>Web Performance</td>
<td>Landing Page</td>
<td>FFU + SEO + PPC + Social Media</td>
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<td>Lead purchase – energy audit-insulation</td>
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<tr>
<td>Lead Volume</td>
<td>Direct Mail</td>
<td>EDDM Radius mailers around jobs</td>
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<td>Lead Volume</td>
<td>Email Program</td>
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<td>Lead Volume</td>
<td>Social Media</td>
<td>Facebook, LinkedIn</td>
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<td>Lead Volume</td>
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Marketing Planning Documents
Provided by Peter Troast, Founder & CEO, Energy Circle

Marketing Plan Template
https://docs.google.com/document/d/1Hcf_0o5F5Vbznxbgg9ecThBFMIPytMSEGboDVxVjPc8/edit?usp=sharing

Marketing Tactics Spreadsheet Template
https://docs.google.com/spreadsheets/d/17B6PN42pwx3OB3Nwjm6aj5mTKW5aCb4hcS8SCITXQ/edit?usp=sharing

Conversion Rate Spreadsheet Template
https://docs.google.com/spreadsheets/d/1e62rFC_YO35xJLArlx-Jd-2-xhUAdhy00 Ir2Tu998/edit?usp=sharing
GETTING IN THE PLANNING MINDSET
"Half the money I spend on advertising is wasted; the trouble is I don't know which half."

John Wanamaker
Our Everyday Lives

Are we spending enough/too much on marketing?

Is our website performing?

What was the return on the home show?

How many leads did we close from paid search? At what cost?

Etc.
What is Your Marketing Challenge?

- Not Enough Leads
- Wrong Kind of Leads
- Conversion Problems
- Diversity of Leads
- Mix of Tactics
- Competitive Pressure
- Pricing
Stages of the Buying Cycle

- Awareness
- Interest
- Evaluation
- Decision
- Purchase
Home Performance Funnel
Where is Your Particular Problem?

Top of Funnel

Middle of Funnel

Bottom of Funnel
Identify Your Particular Problem

Top of Funnel

Not Enough Leads?
The Leads Are No Good!
Wrong Kind of Leads?

Middle of Funnel

Leads Not Converting?
Scheduling Challenges?
Audits Not Converting?

Bottom of Funnel

Quotes Not Closing?
Window Shoppers?
Financing Challenges?
Fundamentals of HP Marketing & Sales

AC Repair
IAQ
Cold Room

Spray Foam
Energy Cost
New Furnace

Asthma
Rebate
Climate Change
Mold

Sick Child
Heat Pump
Fujistu

WHOLE HOUSE HOME PERFORMANCE

MORE COMPREHENSIVE JOBS
HVAC

- Furnace Repair
- AC Replace
- AC Service
- Furnace Install
- Heat Pump
The Role of Various Tactics

- Awareness
- Ripening
- Closing
The Role of Various Tactics

Awareness
- Social Media
- Radio
- Print Ads
- Banner Ads
- PR

Ripening
- Community
- Reviews
- Organic & SEO
- Retargeting
- Social Ads

Closing
- Adwords
- Direct Mail
- Referrals
- PR

The Concept of Integrated Marketing

- Awareness
  - Community
  - Banner Ads
- Ripening
  - Reviews
  - Retargeting
  - Social Ads
- Closing
  - Adwords*

*Final Attribution, but.....
The New Marketing Landscape

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<th>Old &amp; Dying</th>
<th>Old &amp; Living</th>
<th>New &amp; Thriving</th>
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<td>Word of Mouth</td>
<td>Primary Website</td>
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<td>Vehicles</td>
<td>Google+ Local</td>
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<td>Facebook</td>
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<td>Open Houses</td>
<td>Pinterest</td>
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<td></td>
<td>Purchased Leads</td>
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| High Commitment      | Low Commitment                    |
| High Cost            | Modest Cost                       |
| High Risk            | Low Risk                          |
Typical 2017 Marketing Mix

- Organic Search: 15%
- Paid Search: 8%
- Direct Mail: 8%
- Paid Social: 8%
- Print Ads: 8%
- Referring Traffic: 8%
- Online Directories: 16%
- Email: 16%
- Home Shows: 7%
- Community: 3%
- Organic Social: 3%
- Past Customers: 3%
- Referral Program: 1%
- Lead Gen: 1%
Key Elements of a Marketing Plan

1. Situation Analysis
   • Prior Year’s Evaluation
   • Key Marketing Challenges
   • Market Conditions
   • Competition

2. Goals & Objectives
   • Revenue
   • # of Jobs
   • Job Type & Ticket Size
   • # of Leads

3. Target Market
   • Customer Type
   • Geography
   • Building Stock

4. Services, Products & Pricing
   • Services
   • Pricing

5. Marketing Strategy
   • Brand
   • Positioning
   • Messaging

6. Tactics
   • Initiatives
   • Specific Tactics
   • Responsibility
   • Calendar

7. Measurement
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7. Measurement
Stepping Back: An Honest Evaluation

Situation Analysis

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- Competition (who are they and do you stack up?)
  - Company 1 & core strength
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MEASURING YOUR MARKETING
COST PER LEAD
COST PER ACQUISITION
# Working Backwards From Your Goals

<table>
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<th>Revenue Goal:</th>
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<tr>
<td>Average Ticket:</td>
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<tr>
<td># of Jobs:</td>
<td>233</td>
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<tr>
<td>Close Rate:</td>
<td>30%</td>
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YOU NEED **778 LEADS**
## Working Backwards From Your Goals

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**YOU NEED 778 LEADS**

<table>
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<tr>
<th>Marketing Budget @ 7%:</th>
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<tr>
<td>Cost Per Acquisition:</td>
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<tr>
<td>Cost Per Lead:</td>
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## Elements of a Plan

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<th>Quotes</th>
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<td>15000</td>
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<td>$1,167</td>
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</table>

**TOTAL**

- **Impressions/Visits**: 25050
- **Jobs**: 204
- **CPA**: $293

*$1.74 million @ 7500/job*
Cost Per Acquisition

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<td>Home Shows</td>
<td>250</td>
<td>4000</td>
<td>10.00%</td>
<td>25</td>
<td>50%</td>
<td>13</td>
<td>50%</td>
<td>6</td>
<td>$640</td>
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<tr>
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<td>100</td>
<td>50%</td>
<td>50</td>
<td>50%</td>
<td>25</td>
<td>$20</td>
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<tr>
<td>Open Houses</td>
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<td>500</td>
<td>35.00%</td>
<td>26</td>
<td>75%</td>
<td>20</td>
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<td>18</td>
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<tr>
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<td>250</td>
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<td>13</td>
<td>90%</td>
<td>11</td>
<td>90%</td>
<td>10</td>
<td>$49</td>
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<tr>
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<td>750</td>
<td>2500</td>
<td>25.00%</td>
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<td>25%</td>
<td>47</td>
<td>75%</td>
<td>35</td>
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<tr>
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<td>1750</td>
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<td>15.00%</td>
<td>8</td>
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</table>

$1.74 million @ 7500/job
How Did You Hear About Our Company?

“On the Internet”   “Heard an Ad”

“Saw a Truck”   “From a Friend”
## Elements of a Plan

<table>
<thead>
<tr>
<th>Tactics</th>
<th>Impressions/Visits</th>
<th>Cost</th>
<th>Conversion Rate</th>
<th># of Leads</th>
<th>Conversion Rate</th>
<th>Quotes</th>
<th>Conversion Rate</th>
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<td>25%</td>
<td>75</td>
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<tr>
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<td>500</td>
<td>35.00%</td>
<td>26</td>
<td>75%</td>
<td>20</td>
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<td>500</td>
<td>5.00%</td>
<td>13</td>
<td>90%</td>
<td>11</td>
<td>90%</td>
<td>10</td>
<td>$49</td>
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<tr>
<td>Referral Program</td>
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<td>2500</td>
<td>25.00%</td>
<td>188</td>
<td>25%</td>
<td>47</td>
<td>75%</td>
<td>35</td>
<td>$71</td>
</tr>
<tr>
<td>Social Media</td>
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<td>1500</td>
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<td>25</td>
<td>75%</td>
<td>19</td>
<td>90%</td>
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<tr>
<td>Paid Web</td>
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<td>250</td>
<td>25%</td>
<td>63</td>
<td>50%</td>
<td>31</td>
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<td>6</td>
<td>$560</td>
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<tr>
<td>Home Shows</td>
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<td>4000</td>
<td>10.00%</td>
<td>25</td>
<td>50%</td>
<td>13</td>
<td>50%</td>
<td>6</td>
<td>$640</td>
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<td>8</td>
<td>20%</td>
<td>2</td>
<td></td>
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</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>25050</strong></td>
<td></td>
<td></td>
<td><strong>204</strong></td>
<td></td>
<td><strong>$293</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

$1.74 million @ 7500/job
Part 1 Summary

1. Pinpoint Your Marketing Challenge
2. Define Marketing Goals & Metrics
   - Financial & Lead Goals
3. Honestly Assess Current Marketing Tactics
4. Track Your Key Metrics
   - Cost per lead
   - Cost per acquisition
Building Profits with Home Performance: Sales & Marketing Bootcamp

Peter Troast, Founder & CEO

Home Performance Coalition
Home Performance with Energy Star
Columbus, OH September 2017
Part 2 Topics

1. Your Company Presence on the Web
2. Objectively Evaluating Your Website
   - Is it Trusted by Google?
   - Is it Set up to Win Search Traffic?
   - Do Visitors Convert to Leads?
YOUR COMPANY PRESENCE ON THE WEB

(Website, Yes! But Much Much More)
Your Company on the Web

WEB PRESENCE

- Company Website
- 3rd Party Reviews
- Google My Business
- Facebook
- Other Social Communities
- Communities (NextDoor)
- Directories
- Uber Wannabes (Porch, Etc)
OBJECTIVELY EVALUATING YOUR WEBSITE
(is it performing?)
Measuring the ROI of Your Website

1. Traffic
2. Conversion

Your Website = Funnel for All Marketing
Design Can Be Subjective
What Drives Website Performance?

**DOMAIN AUTHORITY**

*Measure of Trust*

- Age
- Popularity (links)
- Size (# Pages)
- Freshness (recency)

**Authority**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain Authority</td>
<td>56/100</td>
</tr>
<tr>
<td>Page Authority</td>
<td>60/100</td>
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</table>
DA/Links Correlation in HVAC/HP/Solar

Links

Domain Authority

~400 HVAC, Insulation, HP, High Performance Build/Remod, Auditors, March 2017
Domain Authorities in HP

Histogram of Domain Authority 3/17

~400 HVAC, Insulation, HP, High Performance Build/Remod, Auditors, March 2017
The Formula

Strong Domain Authority ▶ 30+
Healthy Incoming Links ▶ 40+
Pages to Match Service Search ▶ 20+
Sustainable Fresh Content ▶ 1/week
<table>
<thead>
<tr>
<th>URL: <a href="http://www.esenergycircle.com">http://www.esenergycircle.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Authority</strong></td>
</tr>
<tr>
<td>Domain Authority: 54/100</td>
</tr>
<tr>
<td>Page Authority: 61/100</td>
</tr>
<tr>
<td><strong>Page Link Metrics</strong></td>
</tr>
<tr>
<td>Just-Discovered: 14 Days</td>
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<tr>
<td>Established Links: 153 Root Domains</td>
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<tr>
<td>Total Links: 3,606</td>
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<tr>
<td><strong>Page Social Metrics</strong></td>
</tr>
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<td>Facebook Shares: 27</td>
</tr>
<tr>
<td>Twitter Tweets: 18</td>
</tr>
<tr>
<td>Google+ Likess: 8</td>
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</table>

**Other metrics**

- Inbound Links
- Just-Discovered
- Top Pages
- Linking Domains
- Anchor Text
- Compare Link Metrics
Online Digital Fingerprint

3 Separate Pieces of Data

Name + Address + Phone Number (+ Website)
Great Tool: Moz Local

Can your customers find you online?

Check your listings on Google, Bing, and other local search engines.

Choose the most accurate listing

- **Energy Circle**
  - 81 Bridge St, Yarmouth, ME, 04096
  - (207) 847-3944

- **Yarmouth ME Circle-K Irving**
  - 281 Main St, Yarmouth, ME, 04096
  - (207) 848-0728

- **Rook Energy Solutions, LLC**
  - 23 Island Ave, Cumberland, ME, 04021
  - (207) 272-0272

- **Summit Energy Solutions, LLC**
  - Bridgton, ME
  - (207) 358-0808
Energy Circle
81 Bridge St, Yarmouth, ME, 04095
(207) 847-9644
www.energycircle.com

47% Current Score

47% Complete
36% Incomplete
7% Inconsistent
9% Duplicates

See how complete your listing is on each search engine.
Explore the graph below for more information about a specific engine.
You have 14 incomplete listings. See what to do below.
Incomplete listings can negatively impact your ability to rank well in search engine results.

Energy Circle
81 Bridge St, Yarmouth, ME 04036
(207) 847-3544
http://www.energycircle.com/

Circle Energy
81 Bridge St, Yarmouth, ME 04036
(207) 847-3544

Energy Circle
81 Bridge St #301, Yarmouth, ME 04036
(207) 847-3544
http://www.energycircle.com/

Energy Circle
81 Bridge St #301, Yarmouth, ME 04036
(207) 847-3544
http://www.energycircle.com/

Circle Energy
81 Bridge St, Yarmouth, ME 04036
(207) 847-3544
http://energycircle.com

CIRCLE ENERGY
81 BRIDGE ST, YARMOUTH, ME 04036
(207) 847-3544

Update listing
Well-Tuned Google My Business Data

Categories
Data Accuracy
Reviews (1 for Stars, 10 to Rank)
Review Velocity
Directions?
Open Hours*
TRAFFIC: ARE YOU WINNING THE SEARCH BATTLE?

(SEO is confusing yes. But it’s Not Rocket science.)
GOOGLE TRENDS: WHAT IT TELLS US ABOUT HOW PEOPLE BUY HOME PERFORMANCE/HIGH PERFORMANCE
Learning from Google Search

my house needs
my house needs a makeover
my house needs insulation
my house needs a new roof
my house needs help
my house needs major repairs
my house needs a deep clean
my house needs a facelift
my house needs a new foundation
my house needs a
my house needs a lot of repairs
Google Trends shows how often a particular search-term is entered relative to the total search-volume across a region.
Home Performance/Audit in Context
“skate to where the puck is going to be”
Not Just for Keyboards Anymore
Conversational Search

“energy efficient furnace”

vs

“How do you determine if a furnace is energy efficient?”
Pre-August 2015

Google Paid

Organic

Google Local 7 Pack

Google Paid
Post-August 2015

Google Paid

Google Local 3 Pack

Organic
Post-February 22, 2016

Google Local 3 Pack

Google Paid @ 4

Organic

Nada
Today’s Most Common SERP

Google Paid @ 4

Google Local 3 Pack

Organic
New: Home Services Ads

Home Services Ads

Google Paid

Google Local 3 Pack

Organic
Where’s This Coming From?

$184 million/day
Search Engine Optimization

The “art” of getting your website and it’s pages to rank highly in search engines (mostly Google.)
SEO is NOT a Black Art*
Google Loves (and Rewards) Well Structured Websites with Fresh Content and Trusted Authority

we’ve proven it over and over
Simplifying Search

Context + Authority + Engagement
Understanding Search

- Context
- Authority
- Engagement

Site Content + Incoming Links + User Interaction
The Power of Organic Traffic

<table>
<thead>
<tr>
<th>Source / Medium</th>
<th>Visits</th>
<th>% New Visits</th>
<th>New Visits</th>
<th>Bounce Rate</th>
<th>Pages / Visit</th>
<th>Avg. Visit Duration</th>
<th>Goal Conversion Rate</th>
<th>Goal Completions</th>
<th>Goal Value</th>
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<tbody>
<tr>
<td>1. google/organic</td>
<td>4,362</td>
<td>93.40%</td>
<td>4,074</td>
<td>57.06%</td>
<td>2.62</td>
<td>00:15:49</td>
<td>4.81%</td>
<td>210</td>
<td>$0.00</td>
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Source of Leads

- Organic Search: 15%
- Paid Search: 1%
- Direct Mail: 12%
- Paid Social: 3%
- Print Ads: 4%
- Referring Traffic: 10%
- Online Directories: 8%
- Email: 8%
- Home Shows: 7%
- Community: 8%
- Organic Social: 3%
- Past Customers: 8%
- Referral Program: 8%
- Purchased Leads: 3%
Average Conversion Rates by Medium

Data from 45 Energy Circle Clients, 12 months of 2016
BRAND SEARCH:
YOUR 2ND HOME PAGE
Company Search: Your 2nd Home Page
What Story Does This Page Tell?
CONVERSION RATE
(the most important metric)
LEADS / TRAFFIC = CONVERSION RATE
Two Choices

1. Phone

2. Form

BEAT THE CINCINNATI HEAT!
CALL 513-429-7696

First Name •
Last Name •
Email •
Phone Number •
SUBMIT
Call Tracking is Vital

- Web Forms: 29%
- Phone Calls: 71%
Why Conversion Matters So Much

<table>
<thead>
<tr>
<th></th>
<th>Before</th>
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<tbody>
<tr>
<td>All Web Traffic</td>
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<tr>
<td>Conv Rate</td>
<td>7.72%</td>
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<tr>
<td>Leads</td>
<td>125</td>
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<tr>
<td>Lead -&gt; Job</td>
<td>12%</td>
</tr>
<tr>
<td>Jobs</td>
<td>15</td>
</tr>
<tr>
<td>Ave Job</td>
<td>8500</td>
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<tr>
<td>Revenue</td>
<td>$127,500</td>
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</table>
## Why Conversion Matters So Much

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<td><strong>All Web Traffic</strong></td>
<td>1625</td>
<td>1625</td>
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</tr>
<tr>
<td><strong>Conv Rate</strong></td>
<td>7.72%</td>
<td>9.39%</td>
<td>+1.67 / 22%</td>
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<tr>
<td><strong>Leads</strong></td>
<td>125</td>
<td>153</td>
<td>+27</td>
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<tr>
<td><strong>Lead -&gt; Job</strong></td>
<td>12%</td>
<td>12%</td>
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<tr>
<td><strong>Jobs</strong></td>
<td>15</td>
<td>18</td>
<td>+3</td>
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<tr>
<td><strong>Ave Job</strong></td>
<td>8500</td>
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<tr>
<td><strong>Revenue</strong></td>
<td>$127,500</td>
<td>$156,060</td>
<td>+28,560</td>
</tr>
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</table>
Average Conversion Rates: Select Companies

Data from Energy Circle Clients, 12 months of 2016
Average Conversion Rates: Select Companies

Contractor 1: 10.71%
Contractor 2: 12.02%
Contractor 3: 19.47%
Contractor 4: 19.05%
Contractor 5: 9.84%
Contractor 6: 10.22%
Contractor 7: 13.11%
Contractor 8: 5.88%
Contractor 9: 8.8%
Contractor 10: 6.87%
Contractor 11: 6%
Why Do Some Sites Convert Better?

Correlated

• High % of “Brand” Searches
• Domain Authority > 20
• Volume of Reviews (esp. Google)

Not Correlated

• Age of Website
• Age of Company
• HVAC in Origin
• Envelope in Origin

Commonalities

• Contextual Calls to Action
• A/B Testing
Average Conversion Rates by Medium

Data from 32 Energy Circle Clients, 12 months of 2015
Web Page Elements That Convert

Relevant, Service-specific CTA

Unique Promotions

Relevant Testimonial and/or Case Study

Trust Symbols!
A/B Testing

Schedule your FREE home energy audit today!

FREE Home Energy Audit!
Call 631-647-4701 or Sign Up

Get Started

First & Last Name
Phone Number
Email
Zip Code

Get Started

First & Last Name
Phone Number
Email
Zip Code

energy circle
Building Profits with Home Performance: Sales & Marketing Bootcamp

Peter Troast, Founder & CEO
Home Performance Coalition
Home Performance with Energy Star
Columbus, OH September 2017
<table>
<thead>
<tr>
<th>Initiative</th>
<th>Tactic</th>
<th>Description</th>
<th>Timing</th>
<th>Responsibility</th>
<th>Budget</th>
<th>Metric</th>
<th>Goal</th>
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<tr>
<td>Project Referral</td>
<td>Door Hanger</td>
<td>watch through offer surrounding job area</td>
<td>on site</td>
<td>Janina</td>
<td>$300/a</td>
<td>accept offer</td>
<td>Job</td>
<td>ongoing</td>
</tr>
<tr>
<td>Project Referral</td>
<td>Incentive offer</td>
<td>Free Kill o Watt per closed referral</td>
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<td>Agatha</td>
<td>$1200</td>
<td># referrals</td>
<td>Job</td>
<td>ongoing</td>
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<tr>
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<td>Gift bag post job w postcards</td>
<td>per job</td>
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<td>Job</td>
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<td>Content Publishing Frequency</td>
<td>Weekly blog post/new page creation</td>
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<tr>
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<td>Title/keywords, new content</td>
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<td>organic rank</td>
<td>5 times in top 10</td>
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<tr>
<td>Improve Web Performance</td>
<td>Link Building</td>
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<td>none</td>
<td>Energy Circle</td>
<td>100%</td>
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<tr>
<td>Grow Lead Volume</td>
<td>PPC Advertising</td>
<td>Google Adwords</td>
<td>ongoing</td>
<td>Energy Circle</td>
<td>$100/week</td>
<td>local conversion</td>
<td>30%</td>
<td>ongoing</td>
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<tr>
<td>Grow Lead Volume</td>
<td>Service Magic</td>
<td>Lead purchase—energy audit/visualization</td>
<td>ongoing</td>
<td>Energy Circle</td>
<td>$100/week</td>
<td>Traffic Call/Conversion</td>
<td>30%</td>
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<td>Grow Lead Volume</td>
<td>Direct Mail</td>
<td>EDM Reach mailers around jobs</td>
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<td>Energy Circle</td>
<td>$500/week</td>
<td>Traffic Call/Conversion</td>
<td>30%</td>
<td>ongoing</td>
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<td>Final Program</td>
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<td>Grow Lead Volume</td>
<td>Full Home Show</td>
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<td>Walk Through Program</td>
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<td>job site</td>
<td>Jim</td>
<td>none</td>
<td># of reviews</td>
<td>12 within 6 weeks</td>
<td>ongoing</td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Google+ Local Reviews</td>
<td>request customer reviews</td>
<td>ongoing</td>
<td>Agatha</td>
<td>none</td>
<td># of reviews</td>
<td>12 within 6 weeks</td>
<td>ongoing</td>
</tr>
</tbody>
</table>

https://docs.google.com/spreadsheet/ccc?key=0AofvLVthY691dENRWXdXaGR0WHF6cUZfVnBINzJaN1E#gid=0
<table>
<thead>
<tr>
<th>Initiative</th>
<th>Tactic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Referral</td>
<td>Door Hanger</td>
<td>walkthrough offer surrounding job sites</td>
</tr>
<tr>
<td>Project Referral</td>
<td>Incentive offer</td>
<td>Free Kill-a-Watt per closed referral</td>
</tr>
<tr>
<td>Project Referral</td>
<td>Post job basket</td>
<td>Gift bag post job w postcards</td>
</tr>
<tr>
<td>Improve Web Performance</td>
<td>Content/Publishing Frequency</td>
<td>Weekly blog post/new page creation</td>
</tr>
<tr>
<td>Improve Web Performance</td>
<td>SEO Tuning</td>
<td>Titles/descriptions, new content</td>
</tr>
<tr>
<td>Improve Web Performance</td>
<td>Link Building</td>
<td>inbound links to site</td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>PPC Advertising</td>
<td>Google Adwords</td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Service Magic</td>
<td>Lead purchase--energy audit/insulation</td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Direct Mail</td>
<td>EDDM Radius mailers around jobs</td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Email Program</td>
<td></td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Fall Home Show</td>
<td></td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Summer Home Show</td>
<td></td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Referral Plan</td>
<td></td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Public Relations</td>
<td></td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Community Speaking</td>
<td></td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Social Media</td>
<td></td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Walk Through Program</td>
<td>free walkthroughs while in area</td>
</tr>
<tr>
<td>Grow Lead Volume</td>
<td>Google+ Local Reviews</td>
<td>request customer reviews</td>
</tr>
</tbody>
</table>


Part 3 Topics

1. The Digital Marketing Imperative
2. The Big Four
   - Organic Search
   - Paid Search
   - Paid Social (Facebook)
   - Third Party Reviews
Typical 2017 Marketing Mix:

- Organic Search: 15%
- Paid Search: 1%
- Direct Mail: 12%
- Paid Social: 16%
- Print Ads: 4%
- Referring Traffic: 3%
- Online Directories: 10%
- Email: 8%
- Home Shows: 8%
- Community: 8%
- Organic Social: 8%
- Past Customers: 3%
- Referral Program: 3%
- Purchased Leads: 7%
Growing Importance of Digital: 63%
The Big Divide

Typical Contractor Service Area

# of Housing Units

163,967

Direct Reach

<table>
<thead>
<tr>
<th>Count</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2650</td>
<td>customer names</td>
</tr>
<tr>
<td>2120</td>
<td>good addresses</td>
</tr>
<tr>
<td>900</td>
<td>misc lists</td>
</tr>
<tr>
<td>1727</td>
<td>emails</td>
</tr>
</tbody>
</table>

Direct Reach ~ 1% of Addressable Market
1

THE BEST TRAFFIC: ORGANIC SEARCH (NATURAL, INBOUND)
Today’s Most Common SERP

Google Paid @ 4

Google Local 3 Pack

Organic
Understanding Search

- Context
- Authority
- Engagement

Site Content + Incoming Links + User Interaction
Google Loves Content
SEO & Content = Organic Traffic

- Organic Search: 47%
- Direct: 18.8%
- Paid Search: 11.7%
- Referral: 10.7%
- (Other): 10%
- Display
- Social
- Email
Evaluating Your Web Content

Are All Your **Services** Represented?

Is Your Meta Data Well **Optimized**?

How **Fresh** (or Stale) is Your Content?

How Good is Your **Internal Linking**?

Can Your Users Accomplish Their **Goals**?
### Google Analytics Site Content Data

<table>
<thead>
<tr>
<th>Page</th>
<th>Pageviews</th>
<th>Unique Pageviews</th>
<th>Avg. Time on Page</th>
<th>Entrees</th>
</tr>
</thead>
<tbody>
<tr>
<td>/</td>
<td>26,053</td>
<td>21,293</td>
<td>00:05:06</td>
<td>12,166</td>
</tr>
<tr>
<td>heating-cooling/conversion-gas</td>
<td>1,172</td>
<td>645</td>
<td>00:01:45</td>
<td>532</td>
</tr>
<tr>
<td>heating-oil-gas</td>
<td>935</td>
<td>775</td>
<td>00:16:47</td>
<td>640</td>
</tr>
<tr>
<td>About</td>
<td>629</td>
<td>490</td>
<td>00:01:42</td>
<td>64</td>
</tr>
<tr>
<td>Employment</td>
<td>627</td>
<td>371</td>
<td>00:01:05</td>
<td>58</td>
</tr>
<tr>
<td>Contact us</td>
<td>629</td>
<td>457</td>
<td>00:01:60</td>
<td>160</td>
</tr>
<tr>
<td>heating-cooling/air-conditioning</td>
<td>487</td>
<td>351</td>
<td>00:01:12</td>
<td>214</td>
</tr>
<tr>
<td>financing-incentives</td>
<td>432</td>
<td>362</td>
<td>00:23:43</td>
<td>181</td>
</tr>
<tr>
<td>Heating</td>
<td>411</td>
<td>296</td>
<td>00:00:35</td>
<td>78</td>
</tr>
<tr>
<td>Energy-audits</td>
<td>405</td>
<td>307</td>
<td>00:01:50</td>
<td>111</td>
</tr>
<tr>
<td>Financing</td>
<td>367</td>
<td>397</td>
<td>00:02:05</td>
<td>96</td>
</tr>
<tr>
<td>Solar</td>
<td>386</td>
<td>274</td>
<td>00:05:29</td>
<td>30</td>
</tr>
<tr>
<td>Gas water heaters</td>
<td>352</td>
<td>275</td>
<td>00:14:05</td>
<td>244</td>
</tr>
<tr>
<td>heating-cooling/boilers</td>
<td>345</td>
<td>271</td>
<td>00:03:12</td>
<td>90</td>
</tr>
<tr>
<td>heating-oil-gas-1</td>
<td>343</td>
<td>300</td>
<td>00:10:15</td>
<td>283</td>
</tr>
<tr>
<td>home-performance/insulation-services</td>
<td>333</td>
<td>286</td>
<td>00:02:10</td>
<td>76</td>
</tr>
<tr>
<td>AxSense</td>
<td>302</td>
<td>232</td>
<td>00:01:00</td>
<td>72</td>
</tr>
</tbody>
</table>
Search “site:www.yoursite.com”
Two Pillars of Content

The Foundation
Home Page
About Us
All Your Services
Call to Action/Contact

Ongoing
Blogs
Edits
Photos
Case Studies
Testimonials
Ideally: Dedicated Pages for Key Services

Logical, Clear Structure

Energy Audits

- Blower Door Testing
- Infrared Thermography
- Duct Testing
- Combustion Safety

links
Meta Data

![Google search results for completehomeevaluations.com](image)

About 155 results (0.32 seconds)

Try Google Webmaster Tools
www.google.com/webmasters/
Do you own completehomeevaluations.com? Get indexing and ranking data from Google.

Home Energy Audits | Home Inspections | Mold Inspections ... completehomeevaluations.com
Complete Home Evaluation Services, owned by Dewitt Kimball, offers home inspections, mold inspections, energy audits and efficiency design consultation.
You've visited this page 3 times. Last visit: 3/6/14

Inspection Services | Complete Home Evaluation Services completehomeevaluations.com/services
Complete Home Evaluation Services provide professional, cost-effective home energy audits, inspections and consulting services to Maine homeowners...

Learn - Complete Home Evaluation Services completehomeevaluations.com/learn
Learn more about home energy audits, infrared diagnostic testing, home performance, the economics of energy efficiency vs. renewables, and other essential...

Consulting - Complete Home Evaluation Services completehomeevaluations.com/consulting
Complete Home Evaluation Services offers energy, inspection and green building consulting for builders, renters, homeowners & more.

Formaldehyde Testing - Complete Home Evaluation Services completehomeevaluations.com/formaldehyde-testing
Complete Home Evaluation Services (CHES) offers formaldehyde testing & air quality services for residential & commercial buildings in the Maine.
Meta Titles & Descriptions

Titles: ~55-60 Characters Max (try to use every darn one)
Keyword 1, Keyword 2 | Brand Name | Geography
such as: Energy Audits | Horizon Residential Energy | Portland, ME

Descriptions: 156 Characters Max
Complete sentence ending in a period. Write for humans first. Smart use of keywords.
Unique and relevant to the content on the particular page.
What to Look for in Meta Data

Length
Keywords
Geography
Missing
Duplicates
FLIP A SWITCH: PAID SEARCH
(Adwords, PPC)
Today’s Most Common SERP

Google Paid @ 4

Google Local 3 Pack

Organic
Pay Per Click Marketing

- Paying $3.64
- Paying $3.20
- Paying $2.17
The Power of Extensions

1. Call Extension
2. Callout Extensions
3. Structured Snippet Extensions
4. Sitelink Extensions
The Power of Extensions

- Structured Snippet Extension
- Sitelink Extension
- Location Extension
## Adwords Results

<table>
<thead>
<tr>
<th>Client</th>
<th>Type</th>
<th>Total Leads Jun - Apr</th>
<th>All in CPL</th>
<th>Adwords Leads</th>
<th>Adwords $</th>
<th>Adwords CPL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contractor B</td>
<td>HVAC, HP</td>
<td>3912</td>
<td>$16</td>
<td>1242</td>
<td>$30,006</td>
<td>$33</td>
</tr>
<tr>
<td>Contractor C</td>
<td>HVAC, HP</td>
<td>2115</td>
<td>$23</td>
<td>683</td>
<td>$23,336</td>
<td>$46</td>
</tr>
<tr>
<td>Contractor D</td>
<td>HVAC, HP, Solar</td>
<td>2928</td>
<td>$43</td>
<td>1402</td>
<td>$83,463</td>
<td>$75</td>
</tr>
<tr>
<td>Contractor E</td>
<td>HVAC, Plumbing, HP</td>
<td>1700</td>
<td>$20</td>
<td>1006</td>
<td>$16,099</td>
<td>$21</td>
</tr>
<tr>
<td>Contractor F</td>
<td>HVAC, HP</td>
<td>1495</td>
<td>$25</td>
<td>547</td>
<td>$13,441</td>
<td>$37</td>
</tr>
</tbody>
</table>
# The Power of Paid Search

![Google Analytics Report](image)

## Key Metrics

<table>
<thead>
<tr>
<th>Source/Medium</th>
<th>Visits</th>
<th>% New Visits</th>
<th>New Users</th>
<th>% of Total</th>
<th>Average Session Duration</th>
<th>Average Session Value</th>
<th>Conversion Rate</th>
<th>Cost Per Conversion</th>
<th>Cost per Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>google/pc</td>
<td>1,120</td>
<td>66.79%</td>
<td>748</td>
<td>51.79%</td>
<td>2.37</td>
<td>$0.00</td>
<td>10.36%</td>
<td>116</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

---

*Note: The numbers represent hypothetical data for illustrative purposes.*
Home Performance’s Key Success Factor

Conversion from Single Interest to Whole House Perspective is Critical
NEW WORLD ORDER:
PAID FACEBOOK
Throttled Organic vs Paid Content Boosts
Organic Reach is Officially Dead

You don't always have to blast your AC to stay cool. Here are some alternative tips for this summer!

Tricks to Stay Cool Without Using Air Conditioning | The Fifth Fuel

The weather is heating up here in Manassas and the DC metropolitan area, and for many homeowners, this means running an air conditioner constantly...

4,112 people reached

Like Comment Share
All Is Not Lost!

Cost: $10
Social Ads: Incredible Targeting

CREATE YOUR AUDIENCE

Location: United States, Maine
Cumberland Center, 04021
Falmouth, 04105
Freeport, 04032
Portland, 04101
Yarmouth, 04096

1,200 people

⚠️ Your audience selection is too specific.
This could make your target audience too small for your ads to deliver. Review each targeting selection you have made and try expanding your target audience.

Your ad targets people:
- Who live in:
  - United States: Cumberland Center (04021), Falmouth (04105), Freeport (04032), Portland (04101), Yarmouth (04096) Maine
- age exactly 25 and older
- Who like Charity and causes, Environmentalism, Family, Home improvement or Sustainability
- Who graduated from college
- Who are in the broad category Parents (All)
- Who are married or engaged

Suggested Bid
Amazing Targeting = Low Cost
Mind Blowing Targeting

**Interests**
- Ventilation
- Sick Bldg Syndrome
- Mold Growth
- Radon Mitigation
- SEER
- ASHRAE Handbook
- R-Value
- SIPs
- HRV
- Allergen
- Thermal Comfort

**Behavioral**
- Length of Residence
- Recent Homebuyer
- New Mover
- Charities—Enviro
- Home Renovation
- Green Cleaners
- AOL email
- Gmail email
- Primarily Cash
- Watch Home Imp Shows

**Demographic**
- Expectant Parents
- Very Conservative
- Very Liberal
- Donate to Liberal
- Year Home Built
- Square Footage
- Home Value
- Life Event: Newly Moved
- Friends of Recently Moved
- Liquid Assets
- Net Worth
Custom Audience From Your Lists

Upload List
(email or phone)

Matches in Facebook
## Real World Match Experience

<table>
<thead>
<tr>
<th></th>
<th>Case 1</th>
<th>Case 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orig Email List</td>
<td>6232</td>
<td>3800</td>
</tr>
<tr>
<td>Facebook Match</td>
<td>3100</td>
<td>2700</td>
</tr>
<tr>
<td>Match %</td>
<td>50%</td>
<td>71%</td>
</tr>
<tr>
<td>Lookalikes</td>
<td>1,963,700</td>
<td>1,975,900</td>
</tr>
<tr>
<td>In Service Area</td>
<td>210,000</td>
<td>400,000</td>
</tr>
<tr>
<td>Homeowners</td>
<td>140,000</td>
<td>350,000</td>
</tr>
</tbody>
</table>
Elements of a Facebook Ad

1. Text
2. Image
3. Headline
4. News Feed Desc.
5. Web Address
6. Call to Action
Elements of a Facebook Ad

1. Text

2. Image

3. Headline
4. News Feed Desc.
5. Call to Action
What Your Oil Company Doesn't Want You to Know

Tired of expensive Oil Heat? Feeling stuck in a bad heating oil contract? It's about time that you fight back against the oil companies.

Learn More
Spend less time worrying about your home’s energy use.

Free Home Energy Audit in Bellmore, NY

Our thorough home energy audit identifies whole home opportunities for energy savings. Plus, we make sure you’re taking full advantage of NY and Long Island’s amazing incentive and financing programs.
The Summer heat in New Jersey is just beginning.

Is Your Home Too Hot?!
With offers like 0% interest for 36 months,
Too much of a good thing

Feeling Over-Solared?  

24 Likes
Increase home comfort & cut down on costs with an insulation upgrade!

Professional installation

Learn More

Old insulation removal
Average Conversion Rates by Medium

- **Organic**: 10.44%
- **Paid**: 15.8%
- **Direct**: 6.58%
- **Email**: 7.8%
- **Social**: 2.61%

Data from 32 Energy Circle Clients, 12 months of 2015
# Lead Ad Performance

![Image of Tesla Powerwall](https://via.placeholder.com/150)

**How would you deal with a power outage?**

**Your Home Back-Up is Here**

Keep your home powered on with a back-up source. Find out about the Tesla Powerwall 2 for your home.

**Results**

<table>
<thead>
<tr>
<th>Leads (Form)</th>
<th>Reach</th>
<th>Cost per Lead</th>
<th>Amount Spent</th>
<th>Relevance</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>1,147</td>
<td>$5.45</td>
<td>$38.71</td>
<td>7</td>
</tr>
</tbody>
</table>
Sometimes: Solid Lead Performance

4 months, ~$1000 spend
$30/lead
THE WILD WEST: THIRD PARTY REVIEW DIRECTORIES
Growth of “Review” Searches

[Graph showing the growth of "Review" searches over time, with a trend line indicating an increasing trend from 2005 to 2015.]
Online Reviews vs Personal Recommendation

Percentage of people who trust online reviews as much as a personal recommendation

Local Consumer Review Survey
For which of these local business types does ‘Reputation’ matter the most when choosing a business? (select up to 3)
3 Year Growth: 71% > 91%

Do you read online reviews to determine whether a local business is good or bad?

- **Yes, regularly**:
  - 2010: 22%
  - 2015: 33%
  - 2016: 50%

- **Yes, occasionally**:
  - 2010: 49%
  - 2015: 59%
  - 2016: 41%

- **No**:
  - 2010: 29%
  - 2015: 8%
  - 2016: 9%
Beware Less Than 4 Stars

What percentage of consumers would use a business if it has 'X' amount of stars

- 1/5 stars: 6%
- 2/5 stars: 13%
- 3/5 stars: 57%
- 4/5 stars: 94%
- 5/5 stars: 100%
Reviews: Increasingly Accessible
Reviews in Google Knowledge Panel

Hassler Heating and Air Conditioning, Inc.

5.0 ★★★★★ 30 Google reviews
HVAC contractor in El Cerrito, California

Address: 1837 S 56th St, El Cerrito, CA 94530
Phone: (510) 863-1030
Hours: Open today - 7AM-6PM

Reviews from the web

Demandforce
4.5/5
81 reviews

Houzz
5/5
1 review

Reviews

"The service technician came quickly and was able to diagnose my problem."

"Very exceptional work by competent staff."

"I will definitely be a repeat customer."

Write a review  Add a photo

See all Google reviews
### Review Sites Drive Real Traffic

<table>
<thead>
<tr>
<th>Source</th>
<th>Acquisition</th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sessions</td>
<td>% New Sessions</td>
</tr>
<tr>
<td>yelp.com</td>
<td>1,624</td>
<td>79.42%</td>
</tr>
<tr>
<td>pge.com</td>
<td>346</td>
<td>70.23%</td>
</tr>
<tr>
<td>small.small.com</td>
<td>211</td>
<td>98.05%</td>
</tr>
<tr>
<td>somalt.com</td>
<td>168</td>
<td>100.00%</td>
</tr>
<tr>
<td>my.angieslist.com</td>
<td>152</td>
<td>73.03%</td>
</tr>
<tr>
<td>www1.social-buttons.com</td>
<td>152</td>
<td>100.00%</td>
</tr>
<tr>
<td>google.com</td>
<td>124</td>
<td>92.74%</td>
</tr>
<tr>
<td>advancedhomeenergy.com</td>
<td>123</td>
<td>30.83%</td>
</tr>
<tr>
<td>hncorporation.net</td>
<td>109</td>
<td>85.32%</td>
</tr>
<tr>
<td>facebook.com</td>
<td>94</td>
<td>57.45%</td>
</tr>
</tbody>
</table>
The Rise of Yelp in Service Businesses
### Review Priorities

1. **Google My Business**  
   - Clout of Google, Ranking Factors, Presence in Search 1 for Stars, 10 for Ranking

2. **Facebook**  
   - Dominance with Google Knowledge Graph

3. **Yelp**  
   - Strength in organic listings, Growing fast in Service Biz categories; more critical in tone

4. **Your Specific Priorities Based on Research.**
Knowledge Graph Priorities by Sector

**HVAC**
- Facebook
- Home Advisor
- Yellow Pages

**Insulation**
- Home Advisor
- Facebook
- Yellow Pages

**Home Performance**
- Facebook
- Home Advisor

**Solar**
- Facebook
- EnergySage
- Solar Reviews
- Home Advisor
The “Uberization” of Home Services
Avoiding the Filter

1. Steady, regular review pace (velocity)
2. No duplicate reviews (for Google especially)
   --not on your site
   --not on other review sites
3. On Yelp, look for veterans
4. Don’t incentivize reviews (or pay for them, ever)
What We Know About Negative Reviews

• High percentage are about pre-sale process
  Didn’t return call
  Unresponsive
  Wouldn’t provide free quote

• High percentage are wrong company/not a customer
  Company confusion

• Even the best companies will get a negative review

• Growing distrust of 5-star perfection

Always Respond!
Don’t Only Respond to Negatives
END PART 3
peter@energycircle.com

Founder/CEO of Energy Circle

Linked In: Peter Troast
Twitter: @EnergyCircle
G+: Energy Circle
Facebook: Energy Circle

Volunteer/Pro Bono

Efficiency First Board
Home Performance Coalition
1000 Home Challenge
PHIUS