



# **Fall is Coming. Is Your Marketing Plan Ready?**

Peter Troast, Founder & CEO

Energy Circle Webinar Series

*July 26, 2017*



# How a 30% decrease in site traffic led to a 26% increase in leads



By [Dan Paradee](#) | June 28, 2017

Google Analytics numbers can be misleading. Finding the truth behind the limitless numbers available takes practice, guidance and the ability to step back and ask yourself: "Is this right?" Only by first identifying where your high-quality traffic is coming from can you create a successful marketing plan. When creating a report or analyzing a campaign there are two simple rules I follow.

Rules to Follow:

1. If it looks too good to be true, it probably is.
2. If it looks too bad to be true, it probably is.

By examining your Google Analytics account with these rules in mind you will be able to cut to the core of where your traffic is really coming from, and how much of that traffic is actually worth your time.

Rule #1 - If it looks too good to be true, it probably is.



# Get More Out of Your Marketing by Fully Utilizing Your CRM Software



By [Anna Adamczyk](#) | July 18, 2017

If you want your company to succeed, your marketing and sales must be aligned. If marketing is driving quality leads, but the sales team drops the ball on closing them, then you've got a problem. There are countless resources out there about how to sell and how to use CRM (client relationship management) software effectively, so we're not going to get into those details, but we will show you just what you're missing out on with marketing if you're not using your CRM to its full ability.

## CRM Essentials

The first step is to actually have a CRM. If you intend to grow your HVAC, home performance or solar business, it's a necessary tool to have and doesn't have to be expensive. While you've probably heard of Salesforce, there are equally capable and more affordable solutions out there like Demandforce and Insightly, so there really is no excuse for not having a dedicated CRM tool. Those spreadsheets or hand-written ledgers aren't going to cut it if you're serious about running and growing a successful company.

Essentially, a CRM provides you with a database that has limitless possibilities, if you use it right. Your CRM will only be able to serve you in your marketing and sales efforts if you're constantly filling it with accurate information. It's crucial to have as much data as possible, including names



# 5 Ways To Go Broke On Google Adwords



By [Dan Paradee](#) | July 25, 2017

**The definitive guide to putting yourself out of business over the internet.**

**\*Please do not take any of this advice, and if you are currently using these tactics, please contact us immediately.**

If you could stand to lose some of that pesky cash you have lying around without any return, then this guide is for you. Running an AdWords campaign without any experience is comparable to burning money, except in this case the fire is a very successful company called Google.

Mismanaging an AdWords account is easy. That's why there are professionals who study the system every single day. If you don't feel like studying, and would rather market aimlessly, check out the easy to follow steps below.

## Broad Match Keyword Matches

The quickest way to burn through your budget without getting any results is to use broad match keywords. Broad match keywords allow your ads to show to people who type in keywords that are what Google deems "relevant" to your keyword. Google is smart...right? The table below shows how using broad match keywords can result in your ad showing for a variety of terms you might



# The Hidden Dangers of Buying Leads



By [Peter Troast](#) | June 28, 2017

For many contracting businesses, purchased leads — from lead brokers, franchises, lead-only marketing firms, Google, HomeAdvisor — are the way of the world. This is especially rampant in solar, where an entire breed of lead sourcing companies dominates the top of the funnel, and this approach is becoming prominent in HVAC and home performance as well.

Being overly reliant on purchased leads is a bit like the path to alcoholism: one or two glasses of red wine each night is good for your heart, but when it starts to be bourbon in your OJ each morning it ultimately leads to dependency, a failing liver, and death.

The lure of outsourcing your lead generation is understandable. Companies that offer these services promise “no risk,” “no money upfront,” “100% performance based.” If your business can rely on a third-party to provide a steady flow of leads at a cost that pencils (more on that math in a bit), then everything should be hunky dory, right?

Wrong. Here’s why:

## Dependency

Check your own... alcohol drives health... but when you outsource the majority of your...

# Energy Circle On The Road

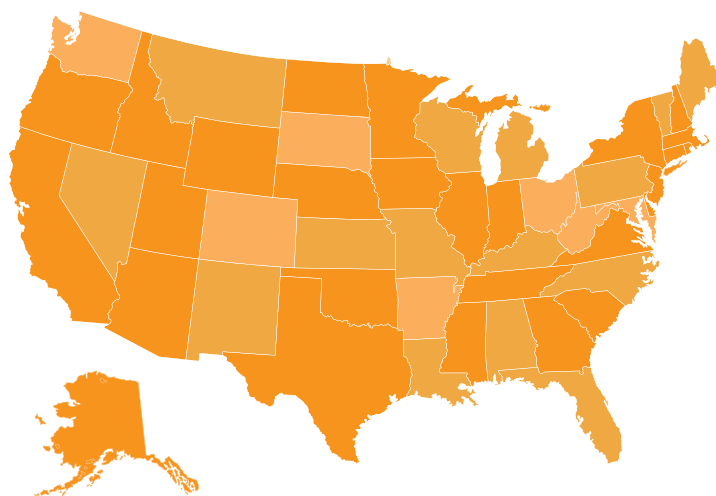
09/12 - 09/14: **Contractor Leadership Live** | Cleveland, OH

09/27 - 10/01: **PHIUS Annual Conference** | Seattle, WA

09/07 -11/14: **Home Performance Coalition Business Workshops** | Columbus & Long Beach

10/19 - 10/20: **Home Performance Coalition SE-** Southeast Regional | Greenville, SC

11/14 - 11/15: **Home Performance Coalition CA** | Long Beach, CA





# **Fall is Coming. Is Your Marketing Plan Ready?**

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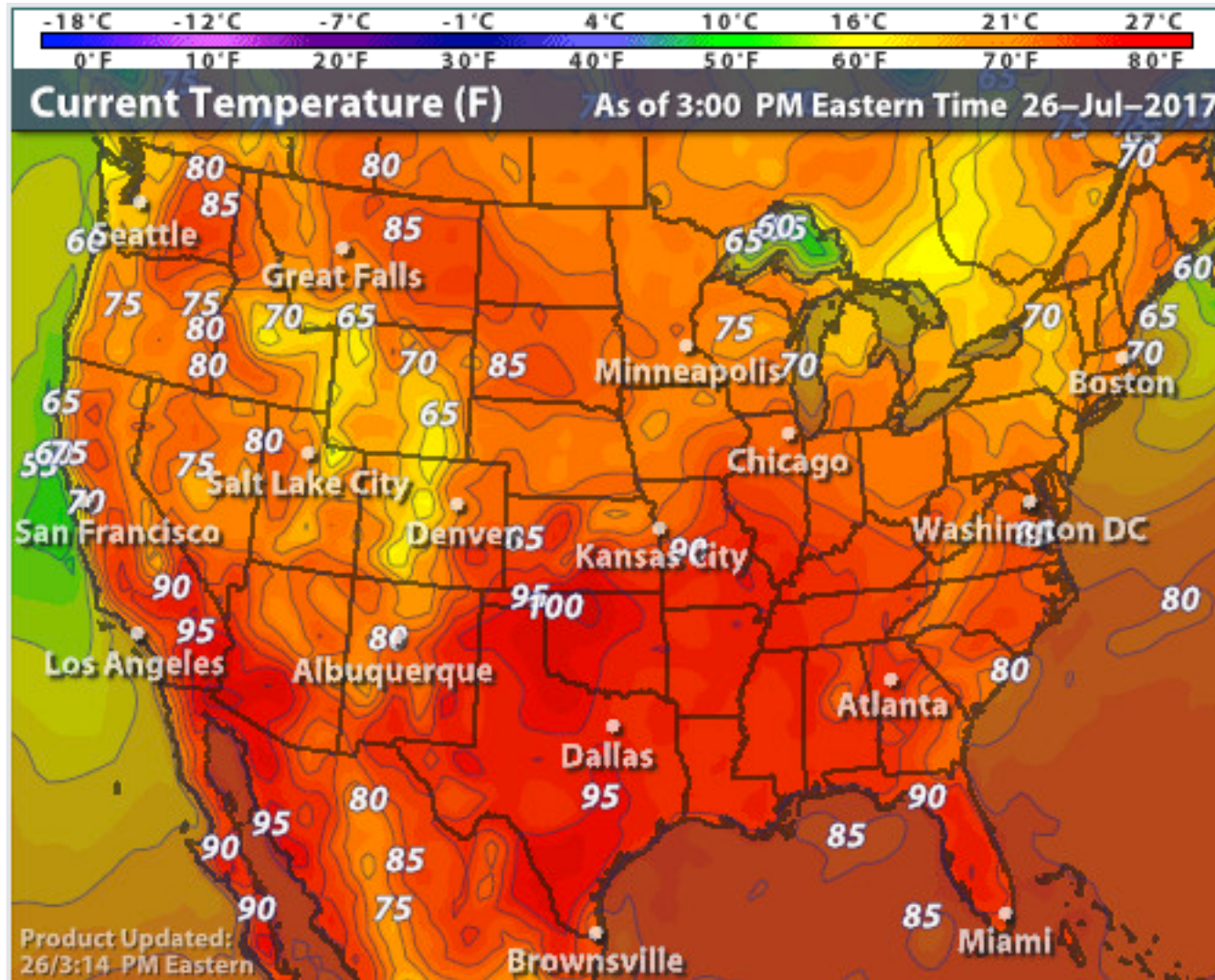
Energy Circle Webinar Series

*July 26, 2017*





# Today



# What We'll Discuss

- 1 Seasonality Triggers—Some Data**
- 2 The Compressed Fall Calendar**
- 3 Tactics to Jumpstart the Fall**

Seasonal Messaging, Content & Web Architecture

Google+ Categories

Promotions

Direct Mail & Email

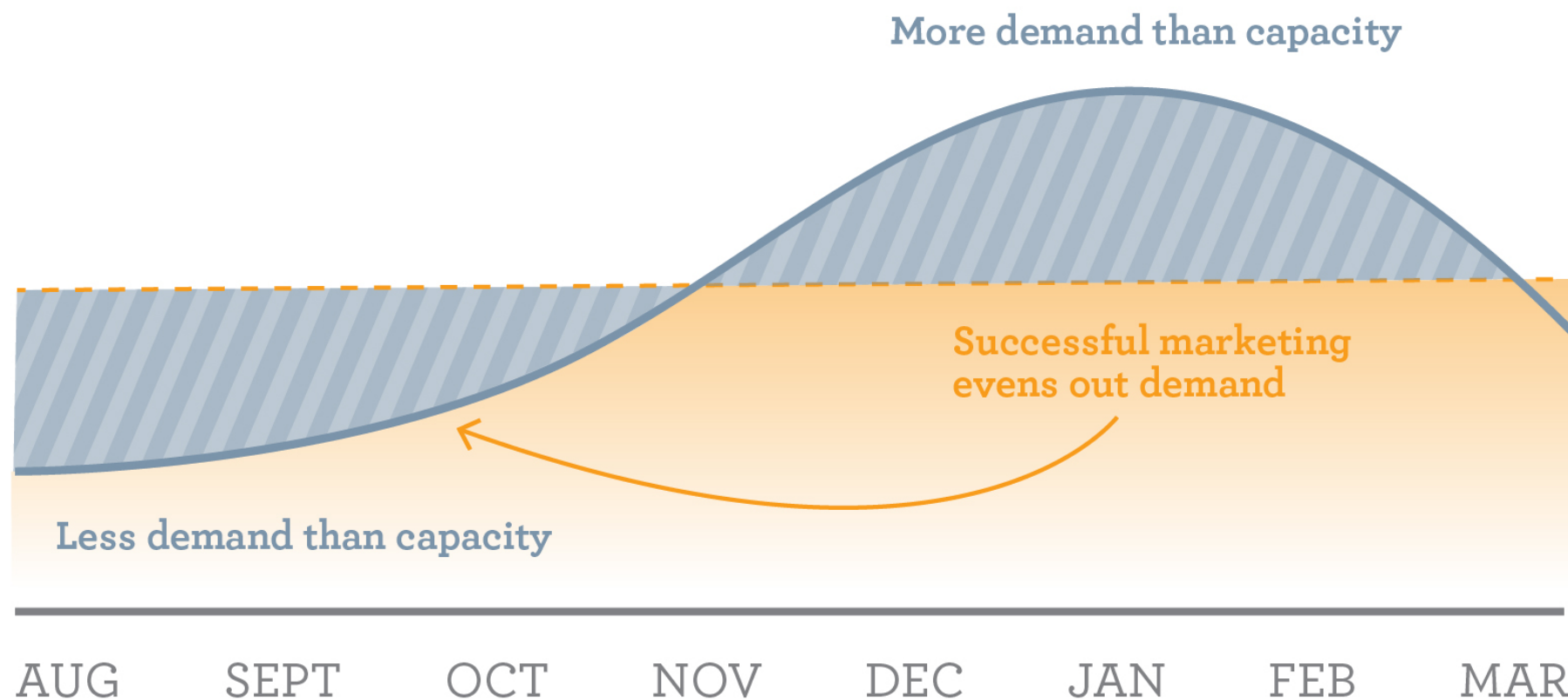
Facebook Advertising

Paid Search

Event Readiness

# Seasonal Reality of Fall & Winter

## FALL / WINTER DEMAND TRENDS





# **DATA ON SEASONAL TRIGGERS (NATIONAL)**

# 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 Search

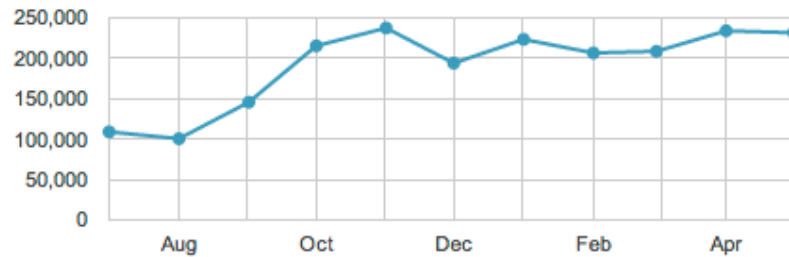
I'm Feeling Lucky

**Google Trends shows how often  
a particular search-term is  
entered relative to the total  
search-volume across a region.**

# Search Volume Seasonality—Winter

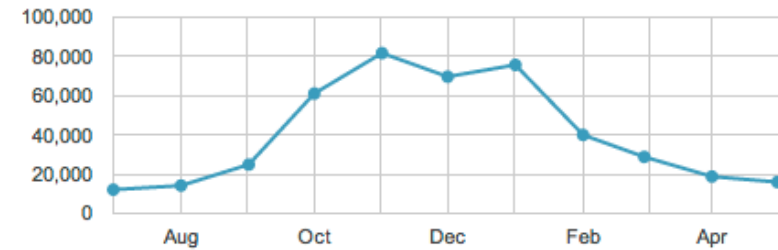
## Energy

Monthly searches for the last 12 months  
Stats also available with downloads



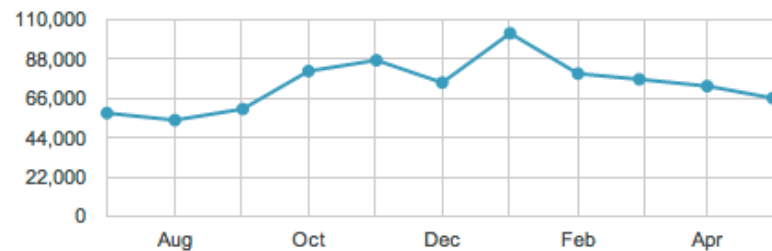
## Furnace

Monthly searches for the last 12 months  
Stats also available with downloads



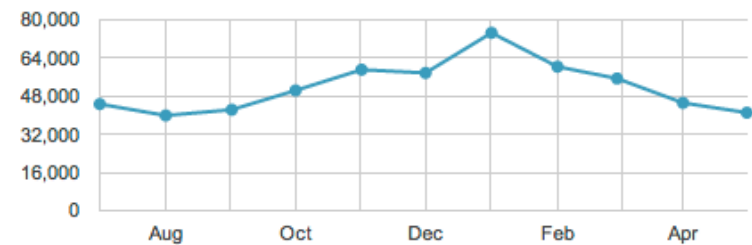
## Insulation

Monthly searches for the last 12 months  
Stats also available with downloads



## Spray Foam

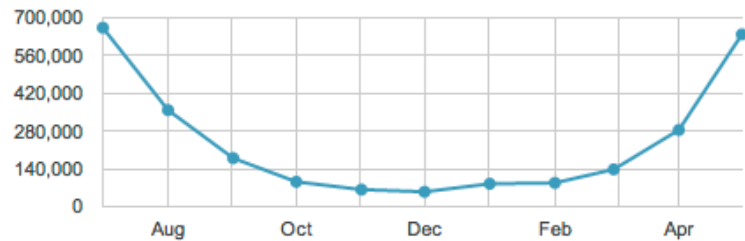
Monthly searches for the last 12 months  
Stats also available with downloads



# Search Volume Seasonality—Summer

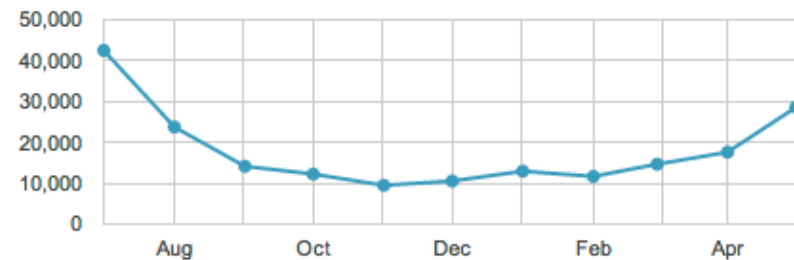
## Air Conditioner

Monthly searches for the last 12 months  
Stats also available with downloads



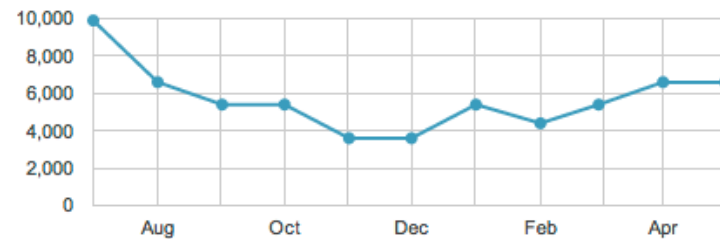
## AC Repair

Monthly searches for the last 12 months  
Stats also available with downloads



## Radiant Barrier

Monthly searches for the last 12 months  
Stats also available with downloads





# 13 Years of Heating & Cooling

● air conditioning  
Search term

● furnace  
Search term



+ Add comparison

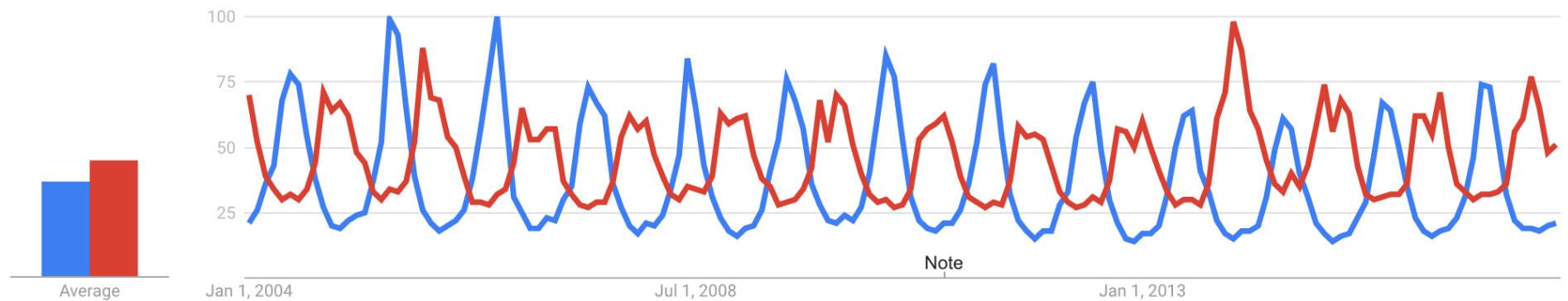
United States ▾

2004 - present ▾

All categories ▾

Web Search ▾

Interest over time ?



# 13 Years of Heating, Cooling & Insulation

● **air conditioning**  
Search term

● **furnace**  
Search term

● **insulation**  
Search term




+ Add comparison

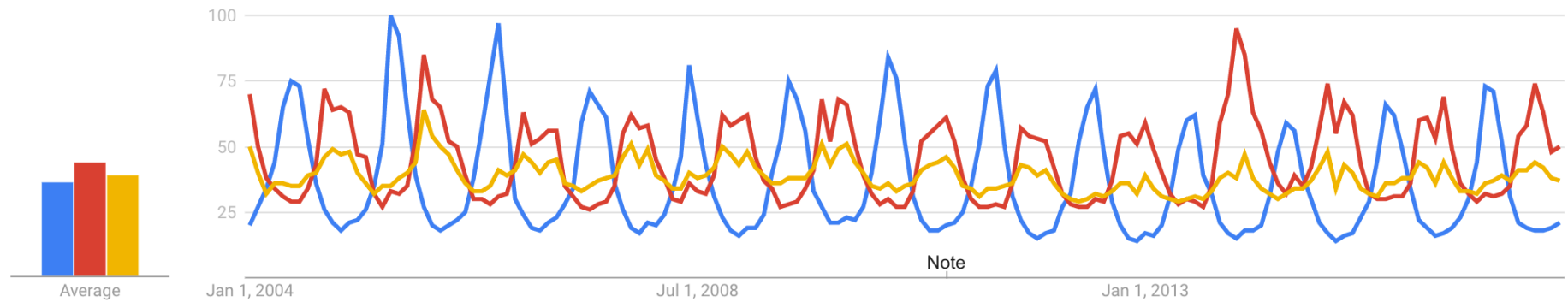
United States ▾

2004 - present ▾

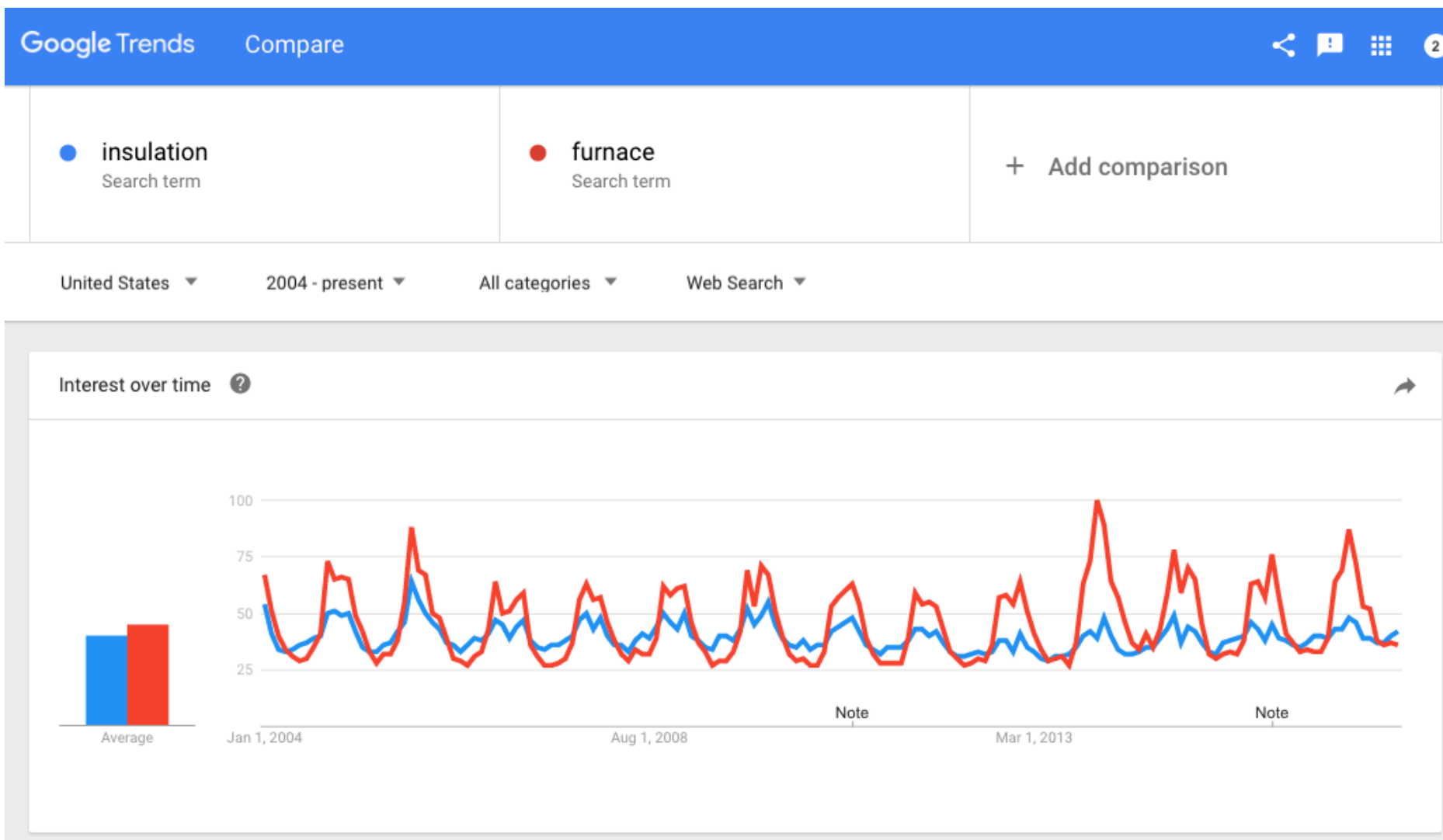
All categories ▾

Web Search ▾

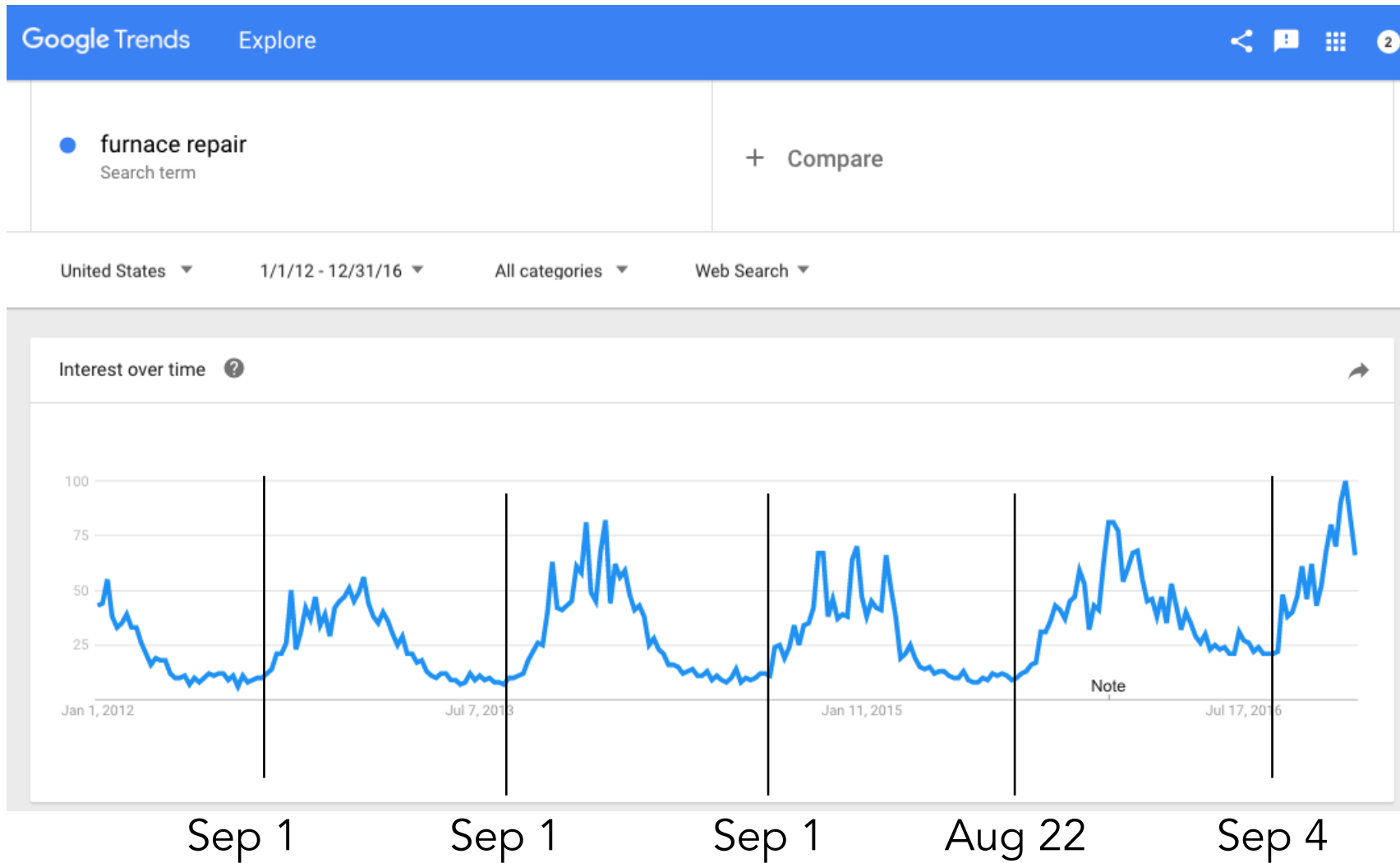
Interest over time 



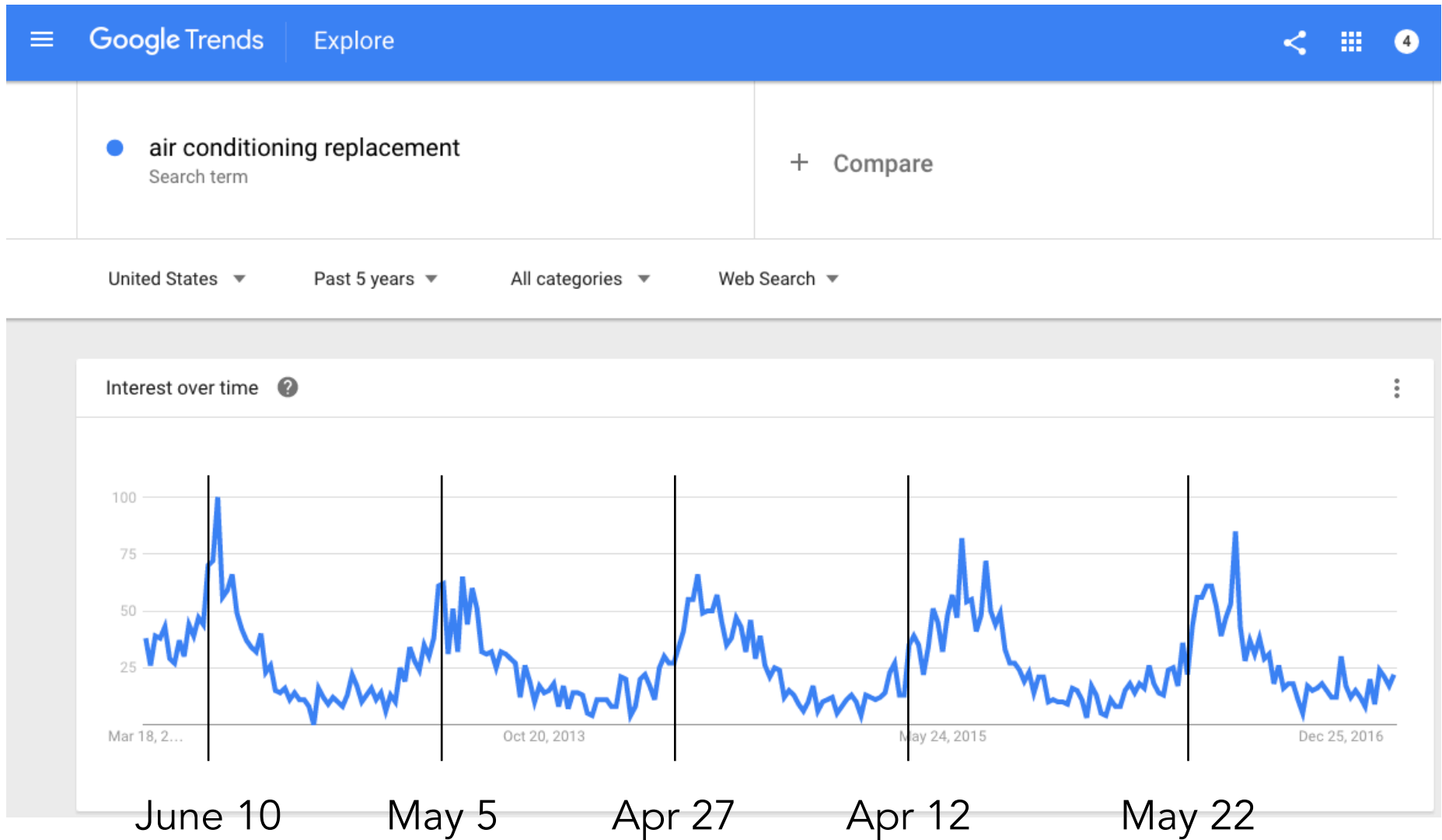
# The Notch in the Peak



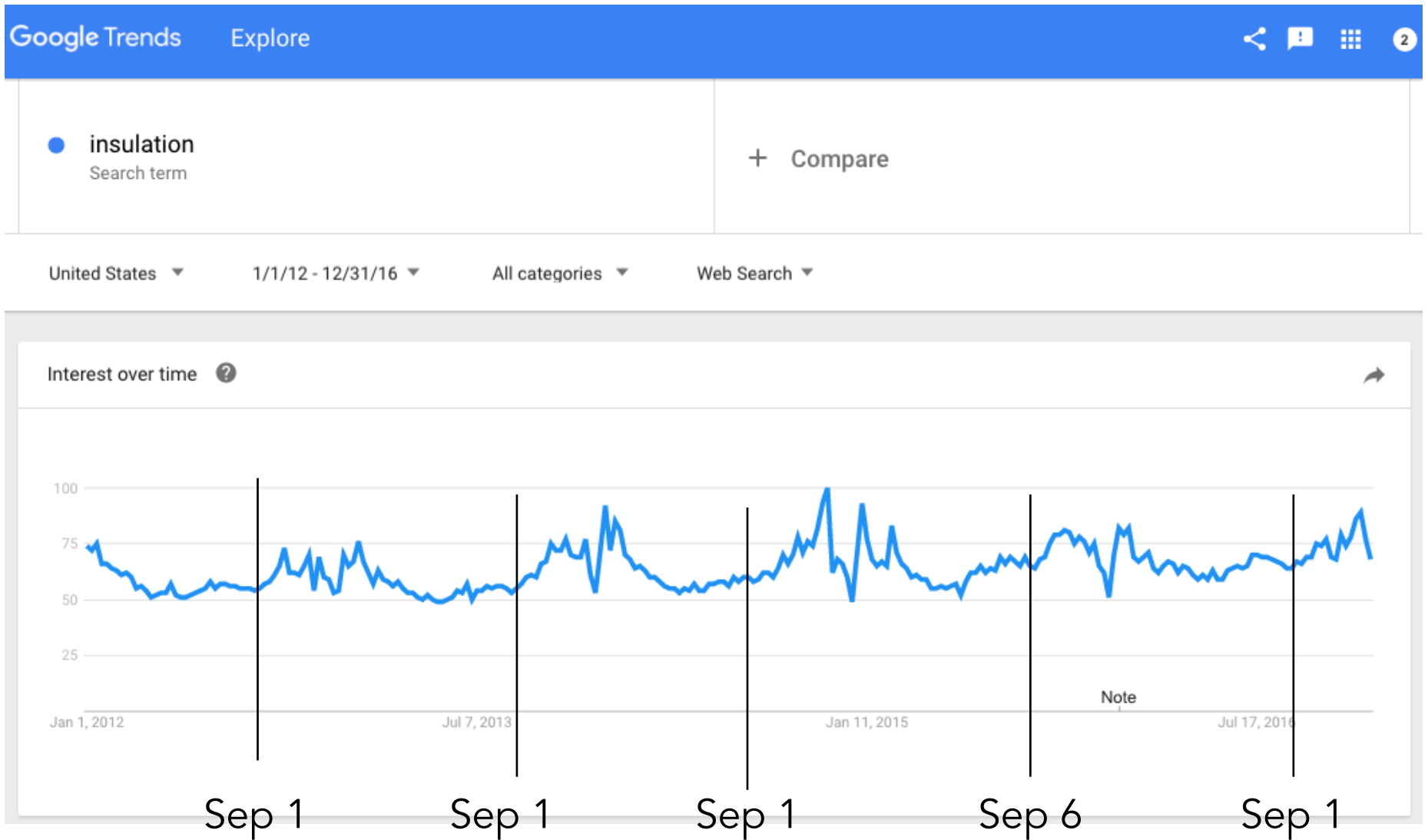
# Remarkable Consistency—Furnace



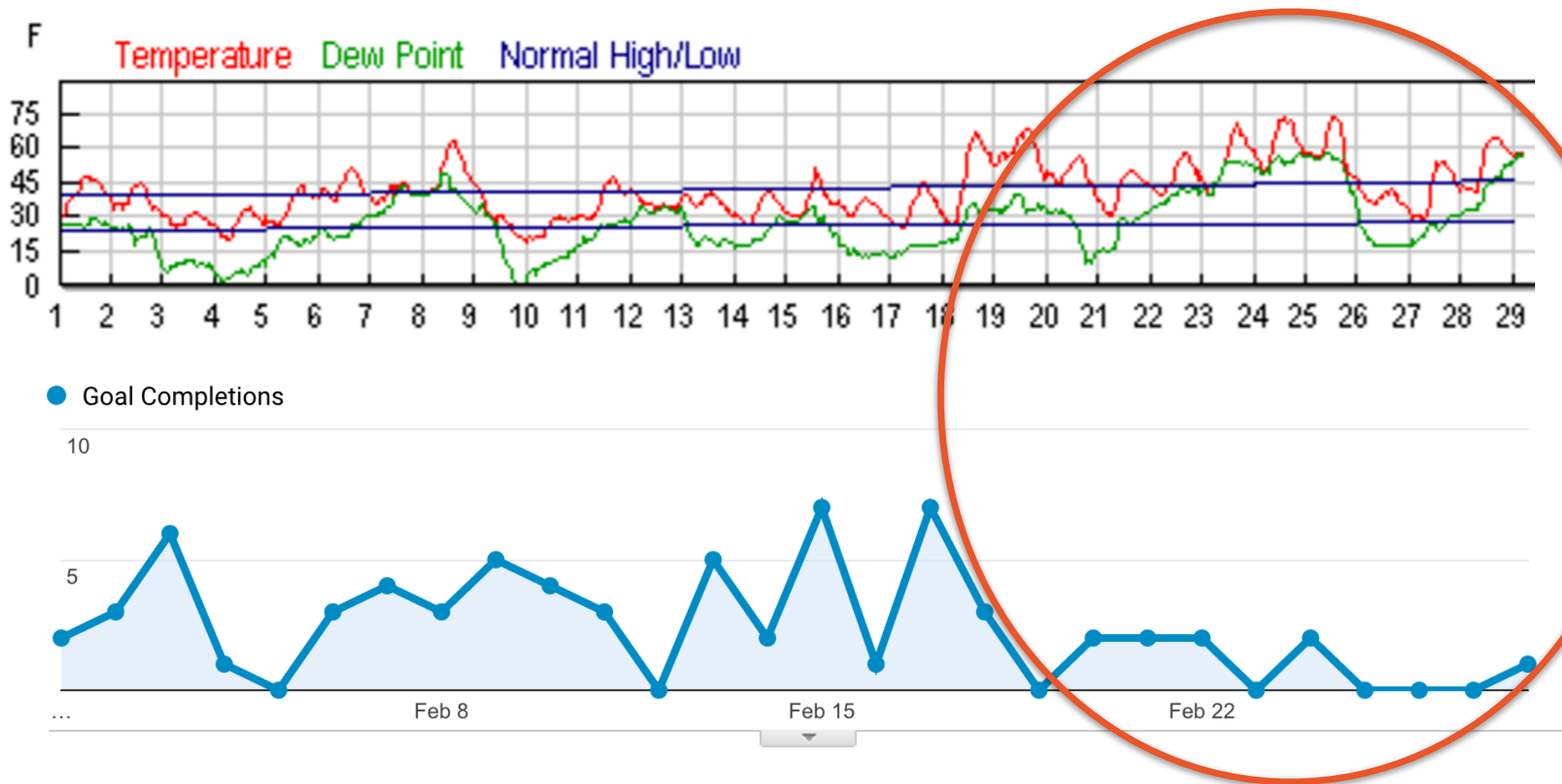
# Air Conditioning is More Variable



# Remarkable Consistency—Insulation



# Insulation's Temperature Correlation

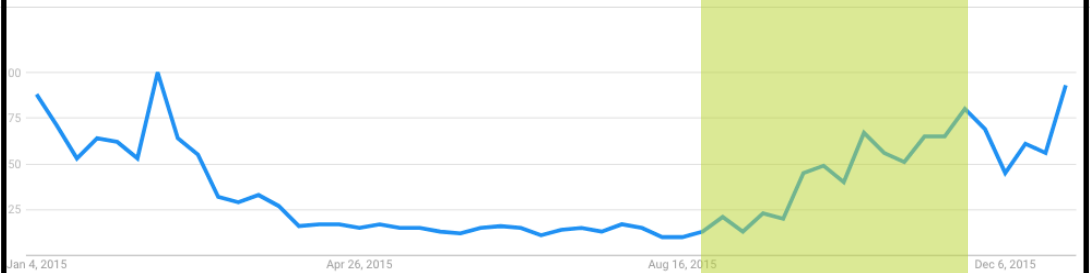


# "Furnace Repair"

2016



2015

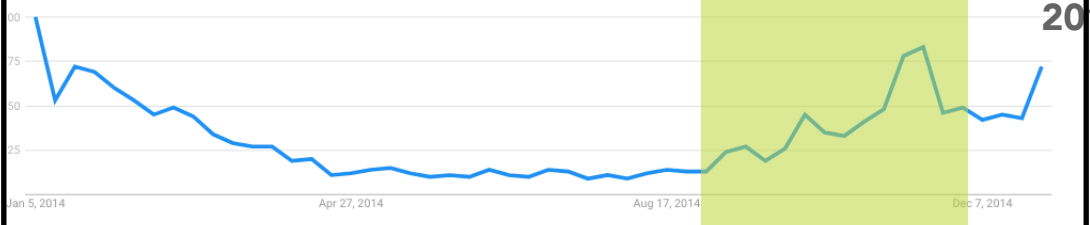


Sept 1

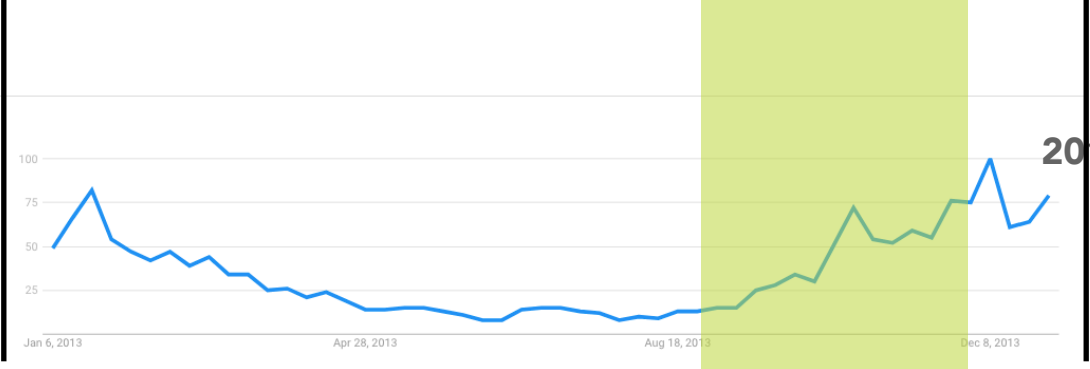


Nov 28

2014

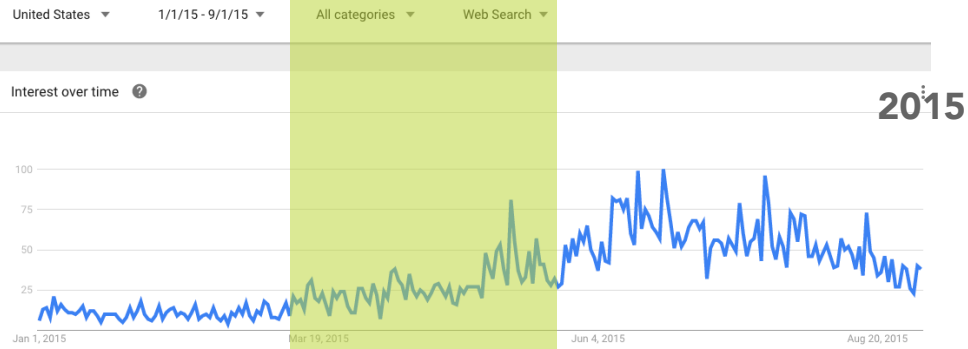
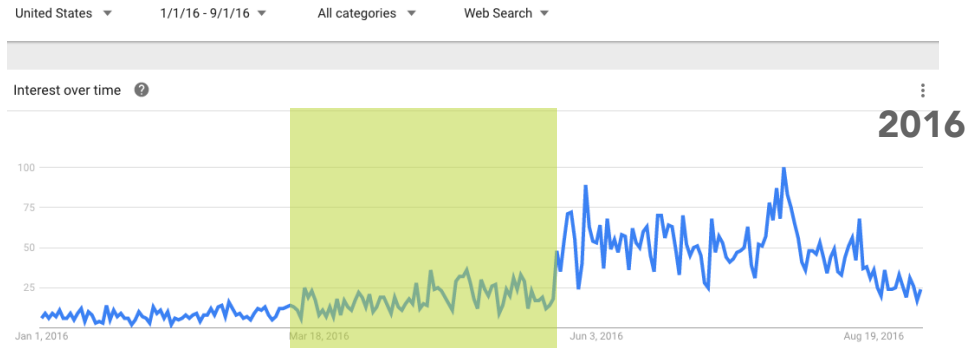


2013





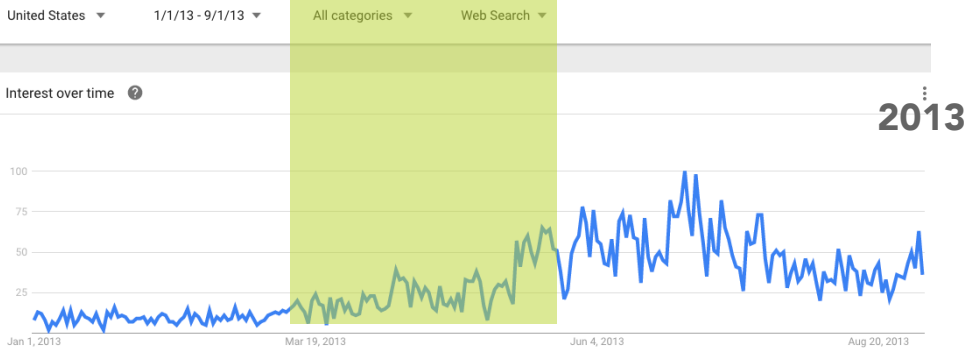
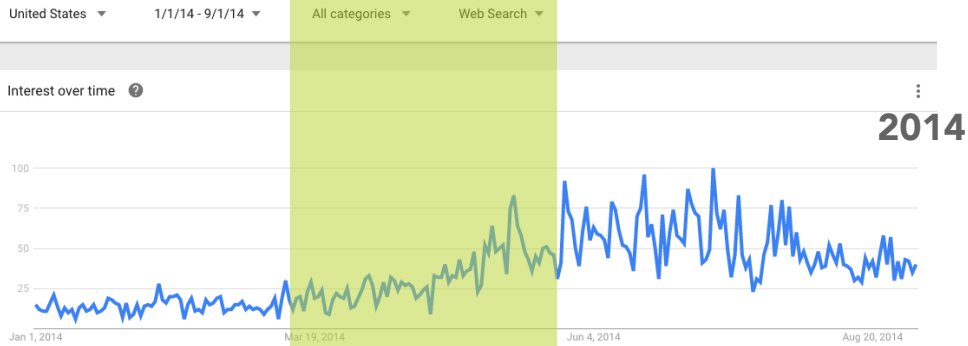
# "Air Conditioning Repair"



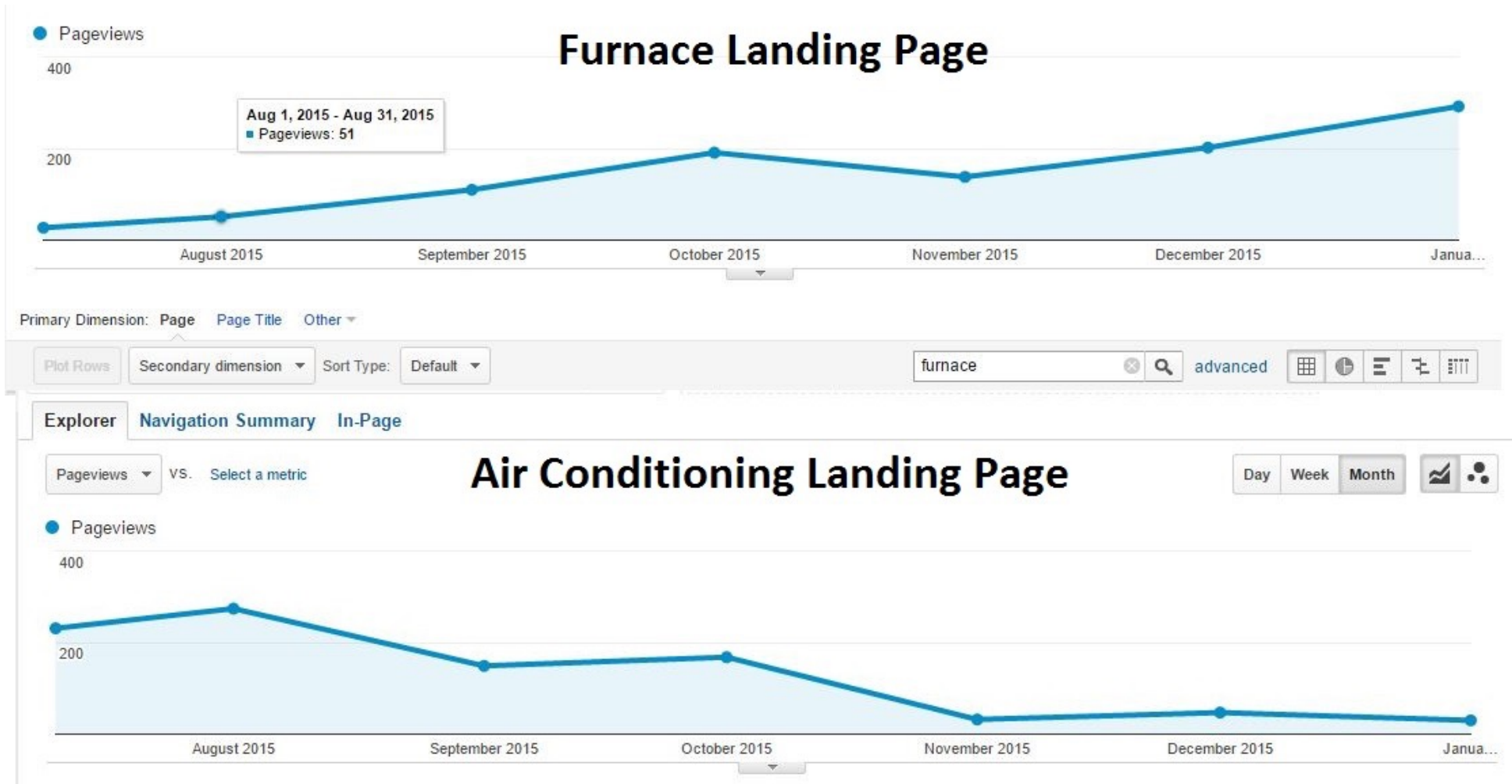
March 1



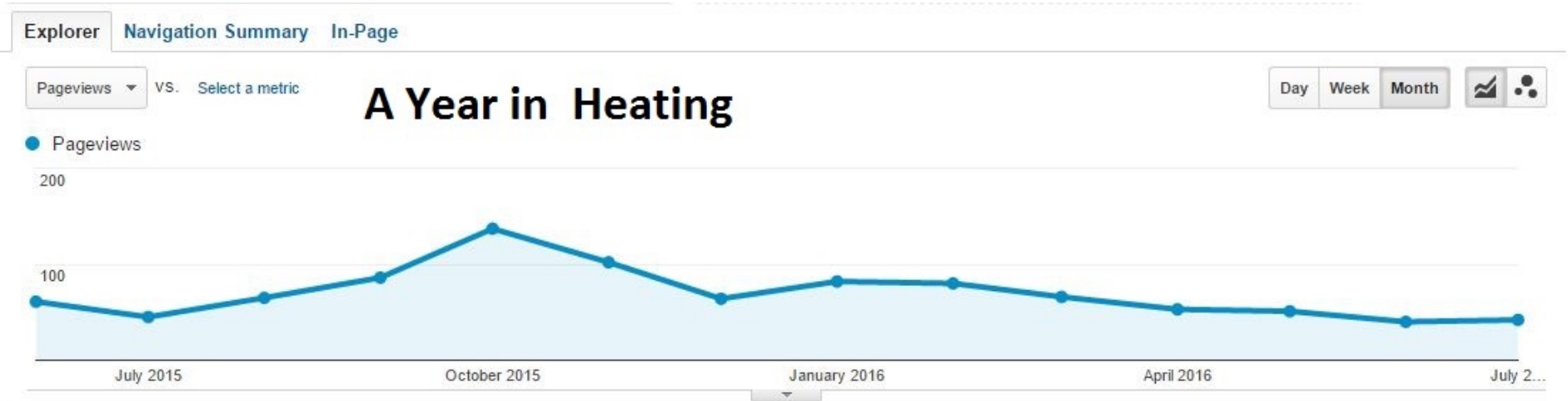
June 1



# The Seasons They Are a Changin'



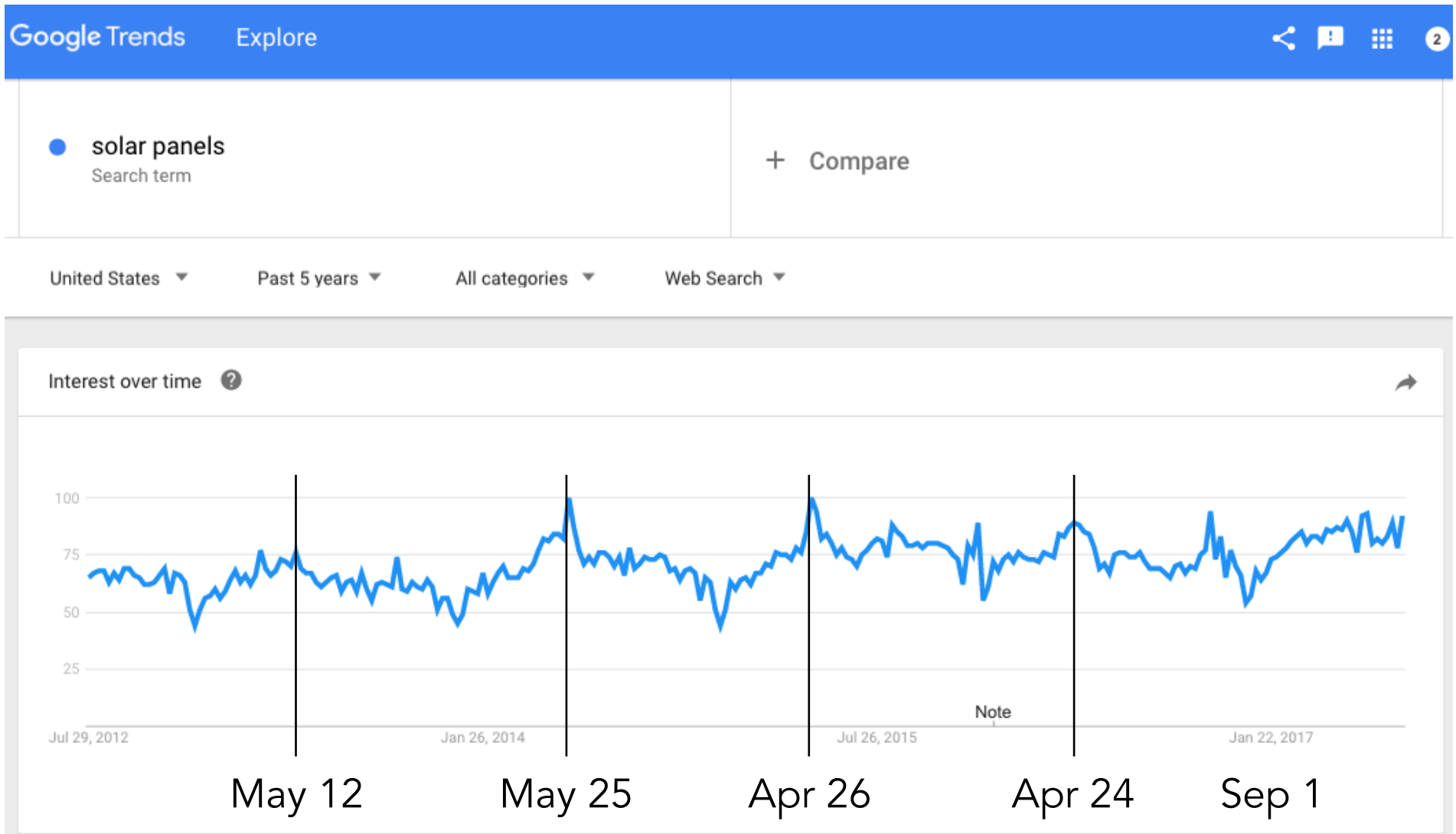
# Early Peak for Heating



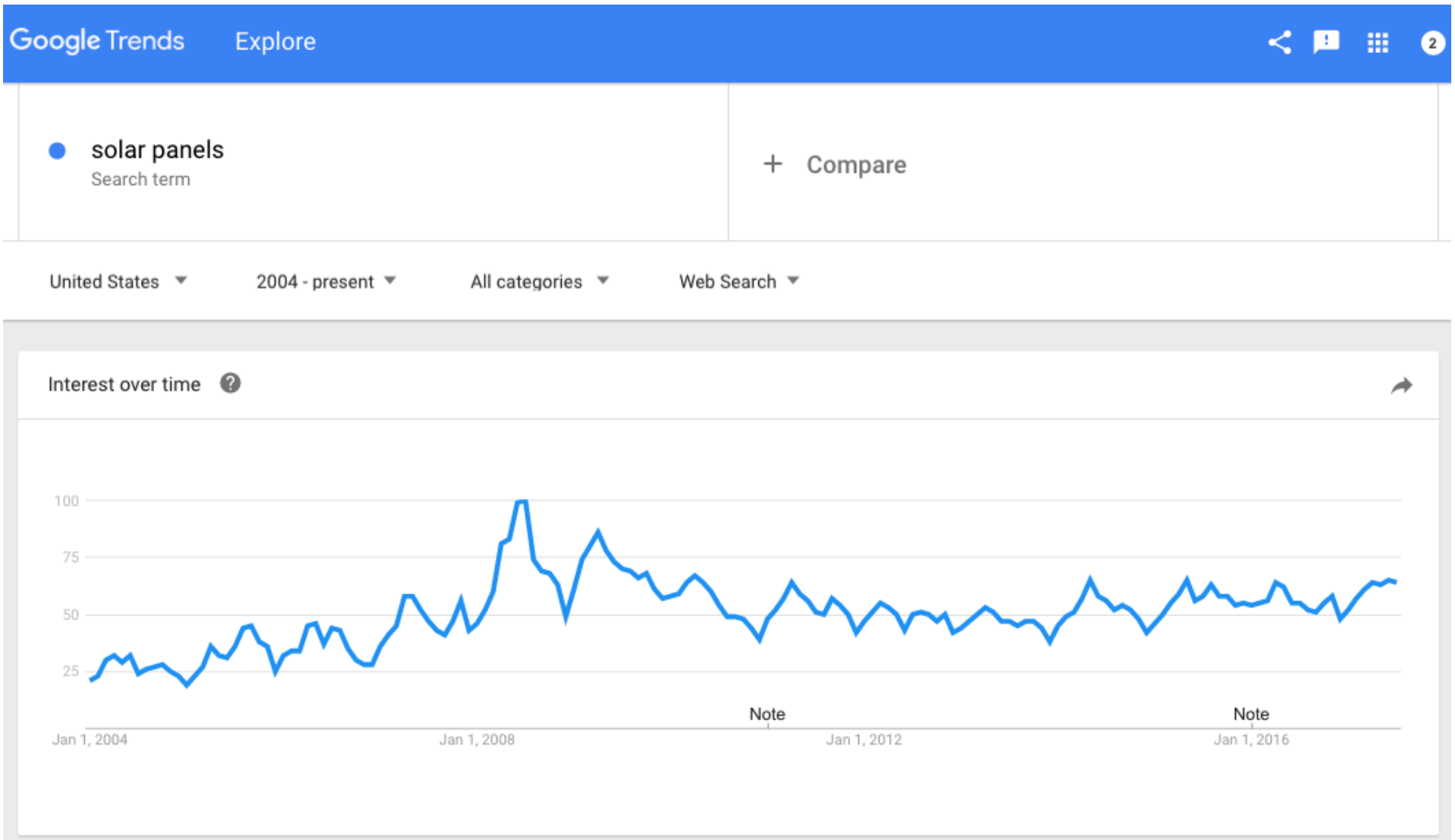


# **LESS SEASONAL OPPORTUNITIES?**

# Becoming Less Seasonal?—Solar



# 13 Years of Solar—Less Seasonal?

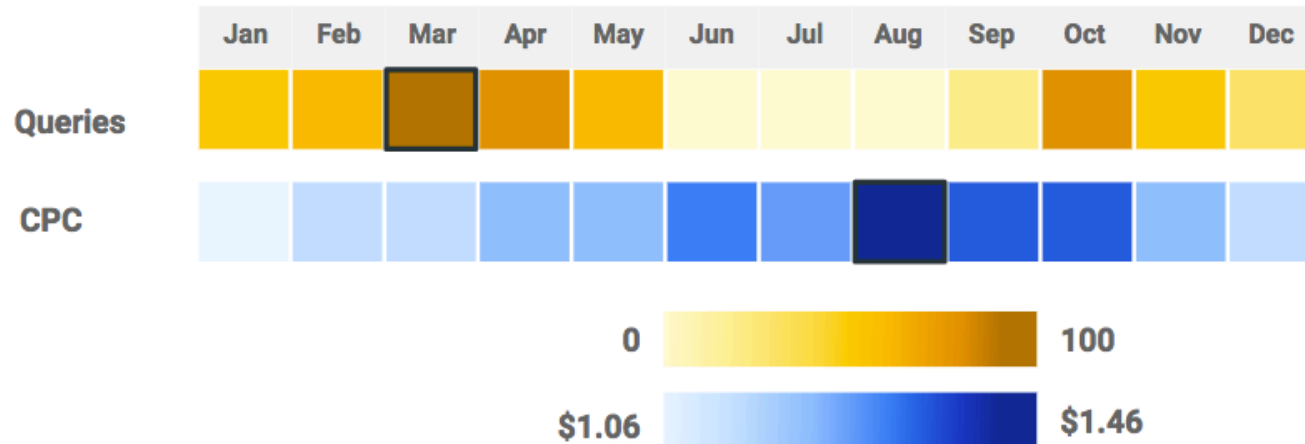


# Solar Seasonality in Search Marketing

Proprietary + Confidential

## Monthly seasonal patterns in queries and CPC

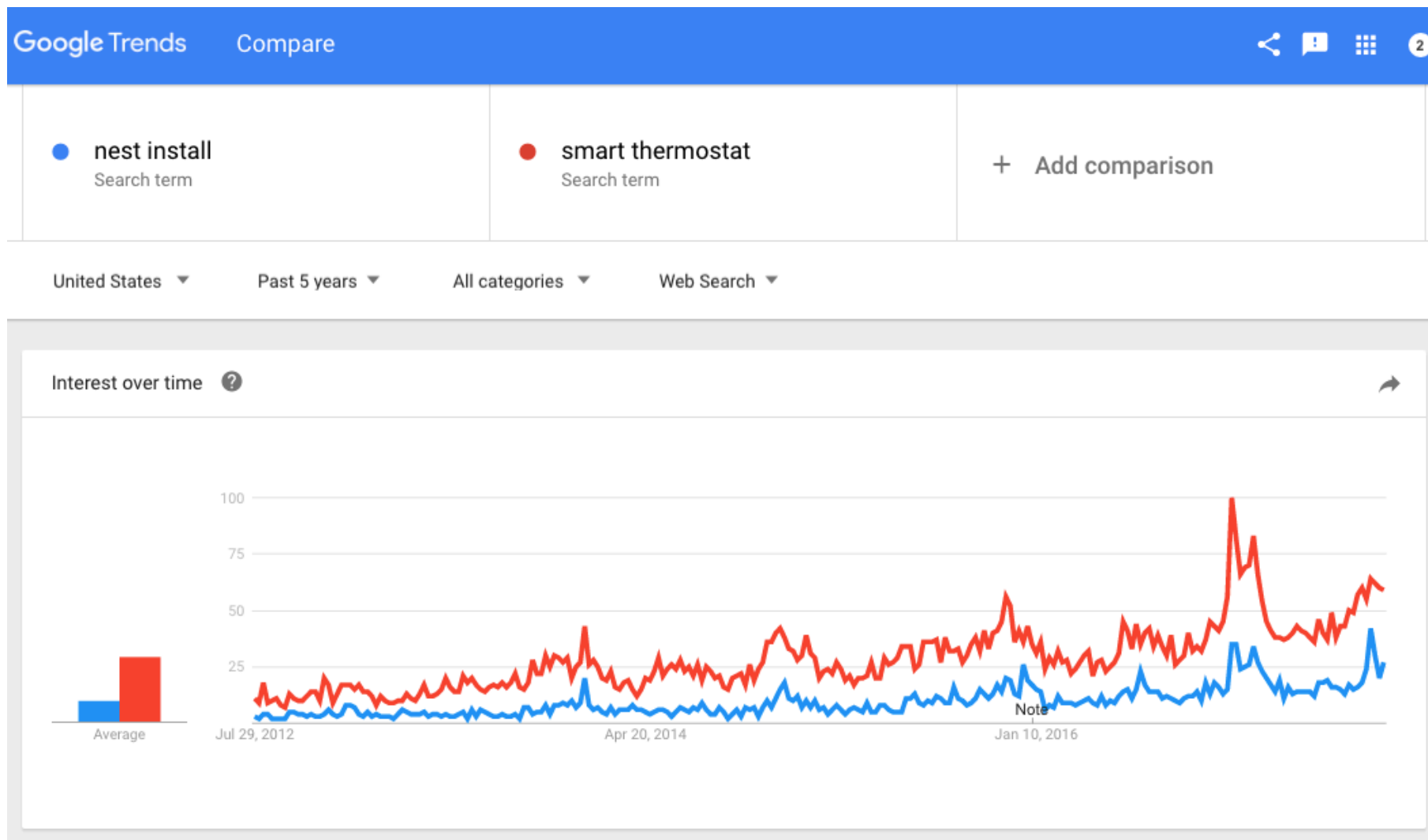
In the last 3 years, CPCs were in the range of \$1.06-\$1.46 and peaked in Aug. Category searches have consistently peaked in Mar.



Google

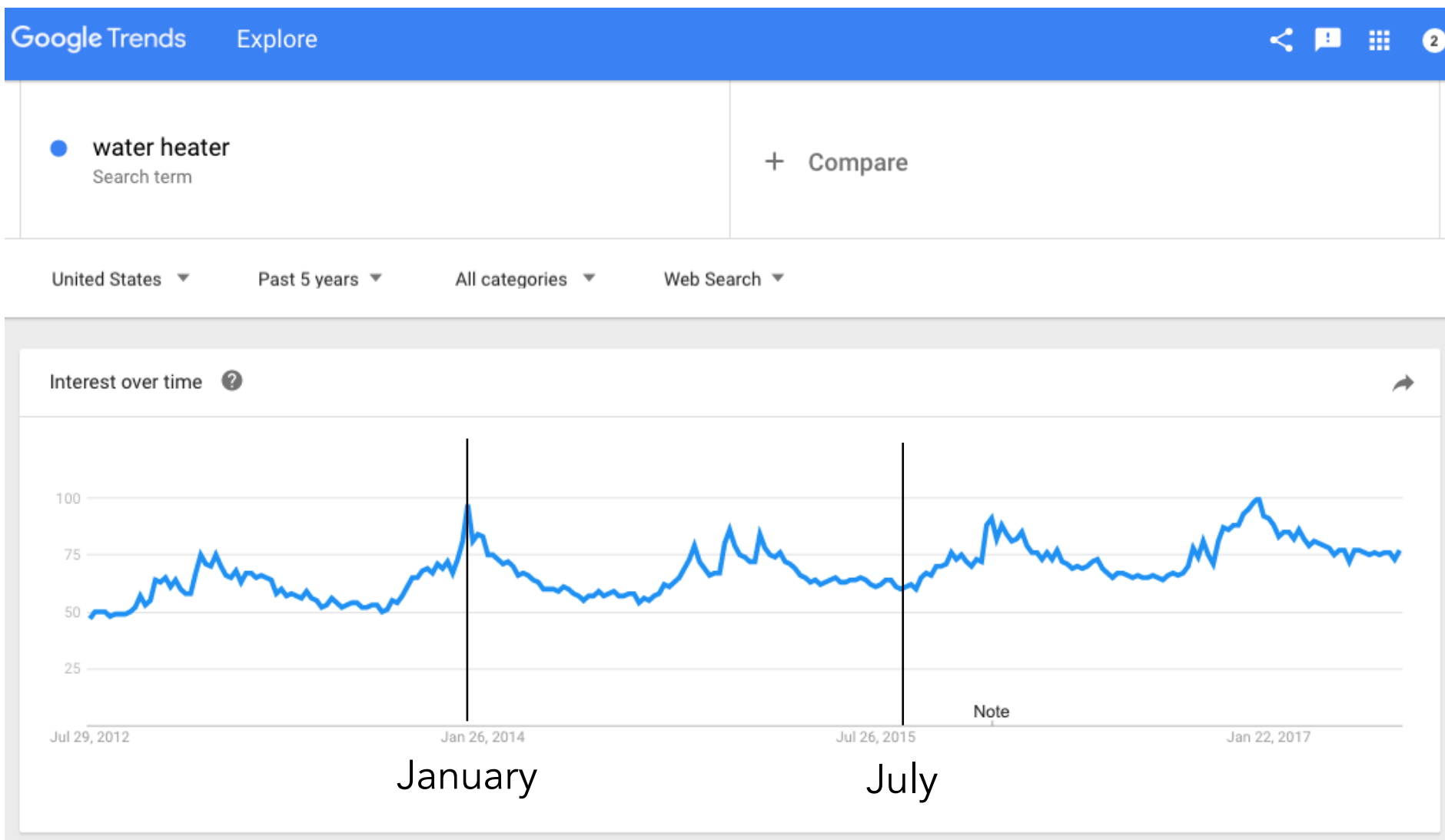
Source: Google internal data for Solar Panels | United States. Time period: Q1 2017

# Nest & Smart Thermostats





# Why is Water Heater Seasonal?



# Insulation: Surprisingly Unseasonal

● insulation  
Search term

+ Compare

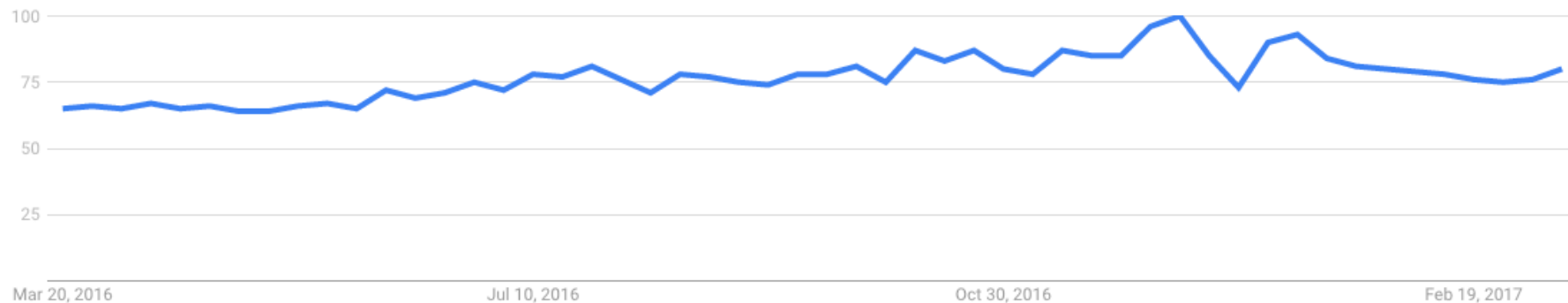
United States ▼

Past 12 months ▼

All categories ▼

Web Search ▼

Interest over time ?



# Ductless Mini Split

● ductless mini split  
Search term

+ Compare

United States ▼

Past 5 years ▼

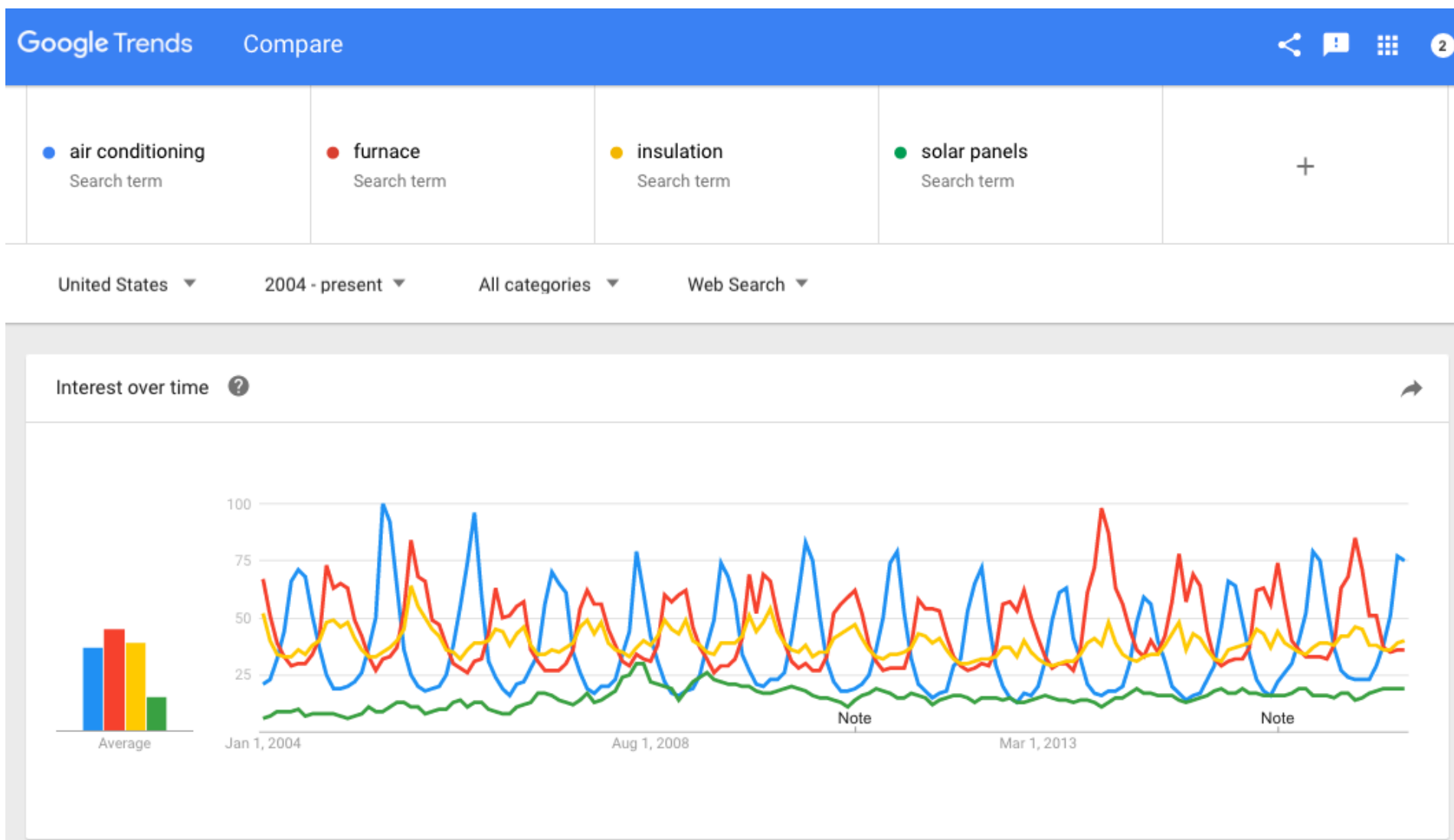
All categories ▼

Web Search ▼

Interest over time ?

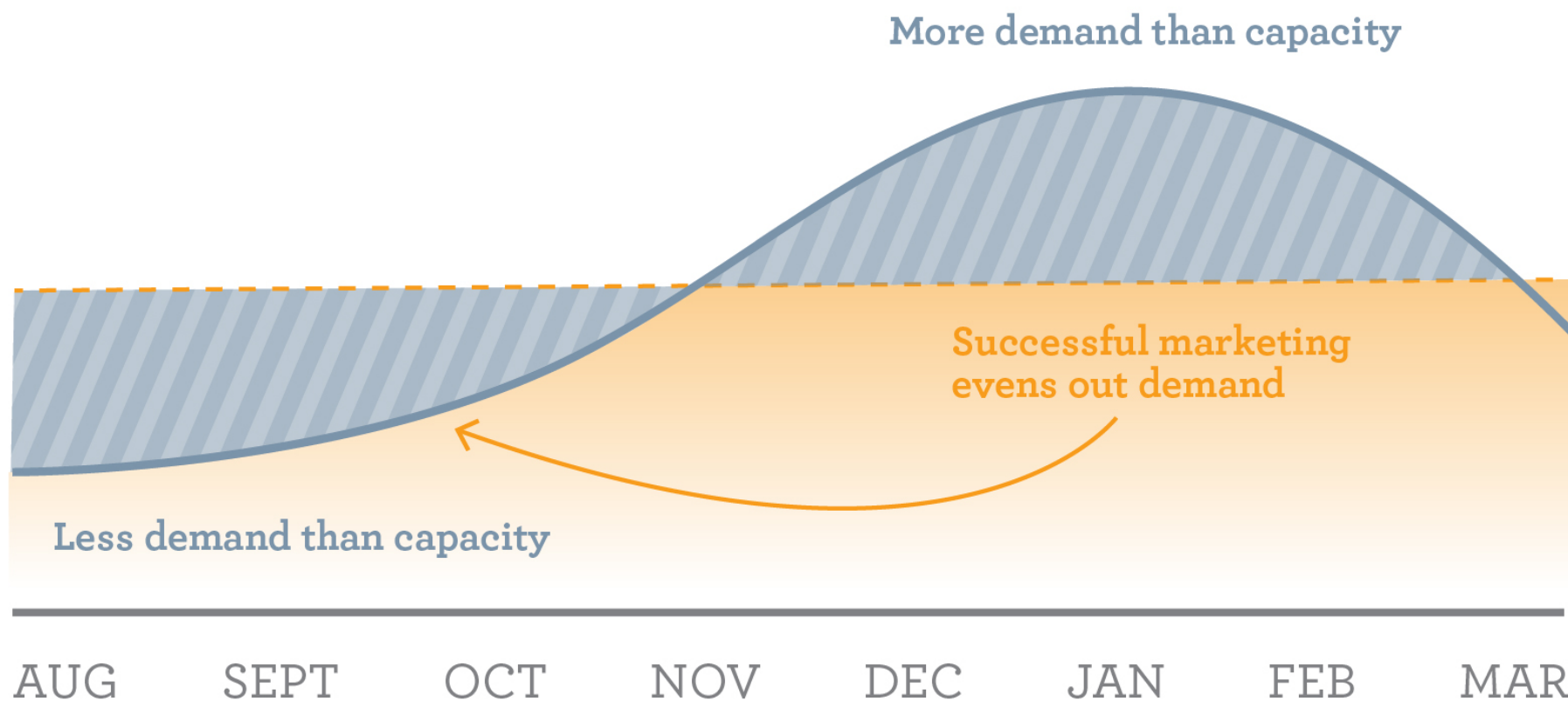


# Beauty of the Whole House Business Model



# Seasonal Reality of Fall & Winter

## FALL / WINTER DEMAND TRENDS



# Key Dates & Events in Fall/Winter Marketing

**DATE**

**Labor Day: The Switch Goes Off (climate zone dependent?)**

**EVENT**

**First Temperature Swing**

**DATE**

**Dead Zone: Last Two Weeks of December**

**EVENT**

**Events: Ice Dams, Severe Cold**

**DATE**

**March/April: We'll Make it til Spring (very climate zone specific)**

# Time is Tight...with Interruptions



~50 Marketing Days Oct—Year End

September = +20

(+40%)



# **SEASONAL MESSAGING, CONTENT & WEB ARCHITECTURE**



# Manage the Seasonal Transition

The image shows a website header with a dark blue background. On the left, there are social media icons for Facebook, Twitter, Google+, LinkedIn, and YouTube. In the center, there are navigation links: ABOUT, CAREERS, JACK'S CORNER, and CONTACT. On the right, there is a prominent red button labeled "REQUEST SERVICE". Below the navigation is a white search bar. To the right of the search bar, there is a text box with the following text: "7AM TO 7PM, 7 DAYS A WEEK", "WITH NO OVERTIME", and "24 HR SERVICE IS AVAILABLE". Below this is a red horizontal bar containing several service categories: PLUMBING, HEATING AND COOLING, DUCT CLEANING, WATER TREATMENT, EXCAVATION, and PRODUCTS. The background of the header features a stylized American flag with stars and stripes.

7AM TO 7PM, 7 DAYS A WEEK  
**WITH NO OVERTIME**  
24 HR SERVICE IS AVAILABLE

PLUMBING HEATING AND COOLING DUCT CLEANING WATER TREATMENT EXCAVATION PRODUCTS

Don't let the heat get you down. Call us we can help

CLICK FOR SERVICE

# Not Suitable for...Fall & Winter



# Generic “Services” Navigation



Service Areas

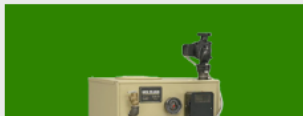
Home Services Rates About Blog Contact

**Furnaces. Boilers. Air Conditioning. We do it all!**

At Maine Heating and Cooling we install and service a wide variety of systems from most manufacturers. Whether you need service on your current system or need to upgrade to a newer system, we are here to help.

> ○ ○ ○ ||

## Featured Services



# No Separation = Thin Content



## Heating and Cooling Services

**Grand Rapids, MI, needs local EXPERTS!**

has been serving the greater Grand Rapids area for over 105 years. We know our heating and cooling systems and everything in between. Our philosophy is simple—we will take care of your home like it's our own. From a service call to the installation of a new system, we will ensure that you have a positive experience with us. For quality heating and AC repair in the greater Grand Rapids, MI area, homeowners should choose Schaaafsma Heating and Cooling. Customers depend on us for the following:



- NATE certified technicians
- 100% Money Back Guarantee
- We care about your home—we use drop clothes and wear protective booties
- Free quotes on new equipment
- Better Business Bureau Member
- Fully Licensed and insured
- We provide a Quality Inspection and Precision Start Up for your new equipment
- 24/7 Emergency Service Available—we're here when you need us!
- We serve residential, commercial and industrial customers.

### Services:

Furnaces \* Geothermal \* Radiant Floor Heating \* Boilers \* Water Heaters \* Central Air Conditioners \* Unico Air Conditioning \* Ductless Air Conditioning \* Zoning Systems \* Customer Design \* Indoor Air Quality Products \* Carbon Monoxide Detectors \* Duct Sealing \* Duct Cleaning \* Insulation \* Service ALL makes & models of equipment

# Separate Seasonal Services!

HEATING

AIR CONDITIONING

HOME PERFORMANCE

DUCT CLEANING



# Two Pillars of Website Content

## **The Foundation**

Home Page

About Us

All Your Services

Call to Action/Contact

## **Ongoing**

Blogs

Edits

Photos

Case Studies

Testimonials

# Deepening Your Heating Content

## **Furnace Repair Services**

## **Furnace Installation Services**

Oil to Gas Conversion

## **Heating Products**

Heat Pumps

Gas Furnaces

## **Insulation**

Cellulose

Spray Foam

Air Sealing

## **Frequently Asked Heating Questions**

# Blog Content Ideas

- **4 Reasons It's Not Too Early for Heating Maintenance**
- **Why It's Not Too Early to Start Thinking About Your Heating System**
- **5 Reasons Why Heating Maintenance is KEY**
- **Making Sure your Boiler is Ready for Winter**
- **Is Your Furnace Ready for Winter?**
- **Infographic: Our Heating System Maintenance Checklist**
- **Promotion: \$50 off a fall energy audit/furnace tune-up**
- **Newsletter: Strategies to Save on Heating this Fall**
- **Infographic: Is Your Home Ready for Winter?**
- **Newsletter: 5 Benefits of Scheduling Heating Maintenance Today**
- **3 Ways to Winterize Your Home That You May Not Have Thought Of**
- **Need a New Furnace? Insulate First**





# **GOOGLE MY BUSINESS CATEGORIES**

# Change Up Your Google Categories

☰ Google My Business

🔍 Search your locations

LOCATIONS

BRAND PAGES

ADWORDS ACCOUNTS



Categories

Air Conditioning Contractor (Primary)

Air Conditioning Repair Service

Air Duct Cleaning Service

Fiberglass Repair Service

Furnace Repair Service

Heating Contractor

HVAC Contractor

Insulation Contractor



# PROMOTIONS

## Get Rebates Of Up To \$1,600 On A Qualifying Lennox Home Comfort System!

*The Dave Lennox Signature® Collection is the ultimate expression of Lennox® innovation, and that makes it the perfect choice for your home*



**GET UP TO A**  
**\$1,600** **REBATE**  
**on a new Lennox® system\***

\*Offer expires 11/25/2016. See local dealer or lennox.com for details.

## GET REBATES OF UP TO \$1,600\* ON A QUALIFYING LENNOX® HOME COMFORT SYSTEM.

Find the Lennox® home air conditioner, furnace or system that ideally suits your needs. All of our options are designed for energy savings and comfort, and are built to last. And as best friends do, let us offer you two times the offer with **REBATES UP TO \$1,600\* AND LOW MONTHLY PAYMENT FINANCING.**

### START WITH UP TO \$1,300 IN REBATES.\*



Save on a complete qualifying Lennox® home comfort system that includes air conditioner or heat pump, gas furnace or air handler and thermostat.

### GET UP TO A \$100 REBATE ON A WI-FI THERMOSTAT.\*



## Don't miss out on this limited time offer!

Our team is here to help

*The local guys and gals*

\* Name

\* Phone

\* Email

\* City

How can we help you?

GET STARTED

### SPECIALS

Free Second Opinion  
Manufacturer Rebates  
Fall Lennox Promotion

# Sample Promotion

## **FREE INSULATION QUOTE BY SEPTEMBER 30**

*Strategy:*

**Urgency play**

**Actually a standard offer**

**Builds insulation awareness**

*Possible Mediums:*

**Facebook**

**Paid Search**

**Website**

**Direct Mail**

# Sample Promotion

## MAXIMIZE SUPPLIER PROMOTIONS

*Strategy:*

**Amplify Manufacturers**

**Use other people's money**

**Assure competitiveness**

*Possible Mediums:*

**Website**

**Facebook**

**Paid Search**

**Email**

# Sample Promotion

## **PUSH ENERGY AUDITS**

*Strategy:*

**Take advantage of winter skew**

**Discount only if you have to**

**Emphasize Preparedness**

*Possible Mediums:*

**Facebook**

**Referrals**

**Website**

**Paid Search**

**Email**

# Sample Promotion

## FREE GIVEAWAY WITH INSTALL

*Strategy:*

**Limited time offer**

**Acceptable cost/acquisition**

*Possible Mediums:*

**Website**

**Direct Mail**

**Facebook**





# Sample Promotion

## MATCH COMPETITOR COUPONS

*Strategy:*

**Level playing field**

**Coupon only (low value)**

*Possible Mediums:*

**Facebook**

**Paid Search**

**Website**

**Direct Mail**



# **DIRECT MAIL & EMAIL**

# Fall Newsletter (Email & Mail)



## Schedule an Energy Audit

Does your home suffer from high utility bills, drafty rooms, cold floors, uneven snow melt, or other comfort issues? An energy audit from Princeton Air includes a detailed home inspection followed by a plan for improvements with estimated costs and energy savings.

[Schedule Your Energy Audit!](#)



## LENNOX FALL SAVINGS NOW IN EFFECT!

Purchase a new Lennox Home Comfort System from Princeton Air this Fall\*, and be eligible to receive:

- 36 Month 0% APR Financing (With approved credit)
- Lennox Rebates up to \$1,700
- Utility Rebates Up To \$1,000
- Free 10 Year Parts AND Labor Warranty\*\* Included!



# **FACEBOOK ADVERTISING**

# Amazing Targeting

Detailed Targeting ⓘ INCLUDE people who match at least ONE of the following ⓘ

Behaviors > Residential profiles

Recent homebuyer

---

Demographics > Home > Home Ownership

Homeowners

---

Interests > Additional Interests

Baby boomers

---

Add demographics, interests or behaviors | Suggestions | Browse

and MUST ALSO match at least ONE of the following ⓘ

Interests > Additional Interests

Central heating

Furnace

Heat pump

heating

Heating system

---

Add demographics, interests or behaviors | Suggestions | Browse

## Audience Definition



Your audience selection is fairly broad.


Potential Reach: 830,000 people

## Estimated Daily Reach





This is only an estimate. Numbers shown are based on the average performance of ads targeted to your selected audience.

# Good Creative for Facebook

 **Princeton Air Conditioning, Inc.**  
Sponsored · 🌐


Schedule your fall heating tune-up with Princeton Air today!  
Precision tune-up, any make, any model. Guaranteed savings.



**Fall 2015 Heating Service Deal!**  
100% Satisfaction Guarantee → [Contact Us](#)


**Avoid Emergency Repairs.**  
Renewed Labor Warranty →

👍 Like    💬 Comment    ➦ Share

 **Energia LLC**  
Sponsored · 🌐

👍    ⌵

**Fall is here! Prep your home with proper insulation.**



**Alternative Insulation for Year-Round Weather**  
See our options [Learn More](#)



# **PAID SEARCH ADVERTISING & REMARKETING**

About 685,000 results (0.67 seconds)

### Baltimore Insulation Pro - Insulation, Ventilation and Attics

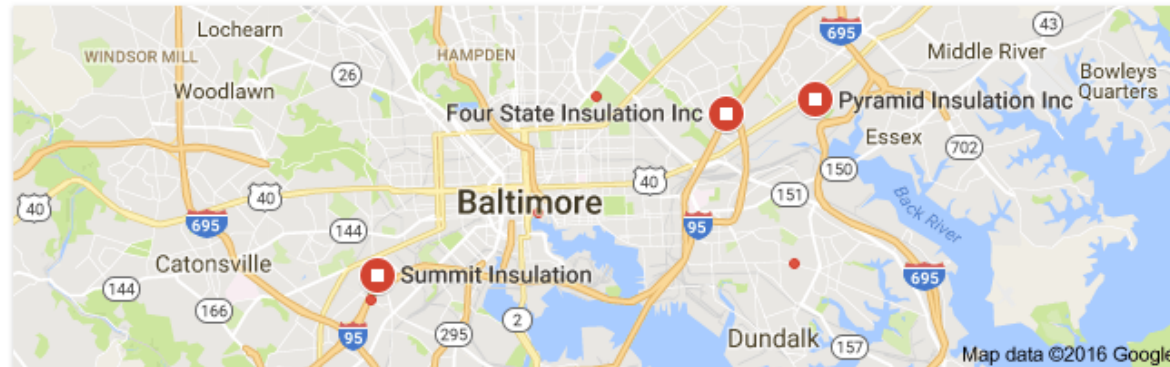
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WEBSITE



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#### Pyramid Insulation Inc

2 reviews · Insulation Contractor

1100 Batavia Farm Rd. Baltimore · (410) 682-9566

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WEBSITE



DIRECTIONS

#### Four State Insulation Inc

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DIRECTIONS

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**Pine State Services**  
3.9 ★★★★★ (20) · Air Conditioning Contractor  
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**Maine Heating And Cooling**  
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# Temperature/Event Based PPC

- **Prepare Paid Search Campaigns for Swings**

Temperature-based Bid Multipliers

Event Campaigns in the Can

# Retargeting: Annoying but Effective

SECTIONS HOME SEARCH **The New York Times** TRY TIM

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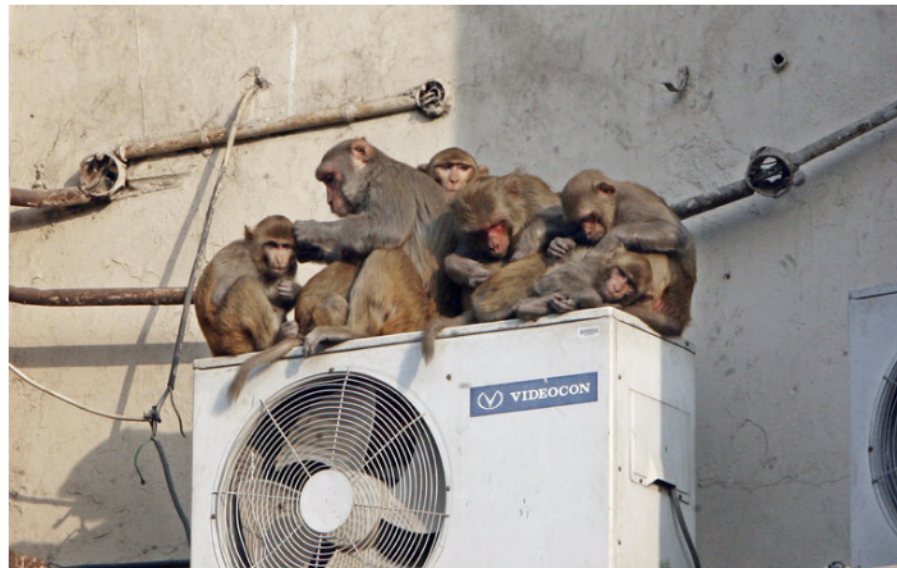
ACTIVE ANKLE ... ~~\$49.18~~ \$34.94

ACTIVE ANKLE ... ~~\$60.56~~ \$33.25

## SCIENCE

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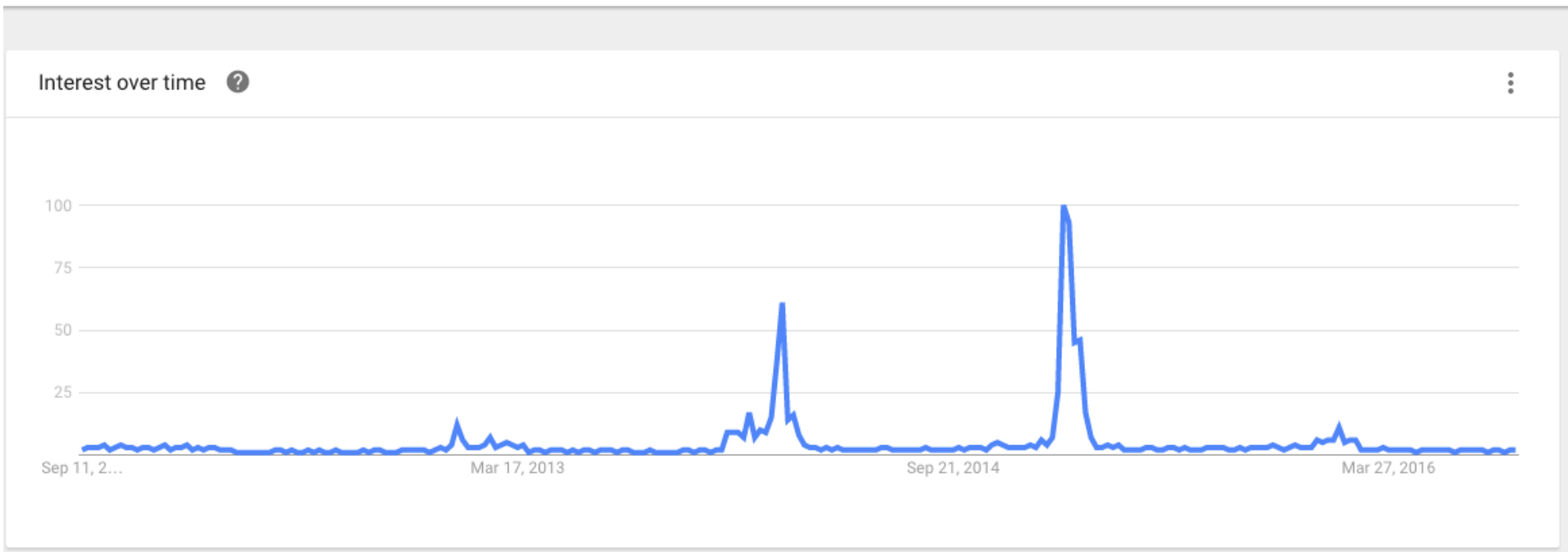
# **EVENT READINESS**

# Episodic Lead Drivers

● ice dam  
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# Campaigns in the Can



# Questions?

## Founder/CEO of Energy Circle

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