

# The Homeowner Experience

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SALE | SERVICE | REFER | REPEAT



**GOOD MARKETING GROUP**  
Want **GREAT** Marketing? Get **GOOD** Advice.

[GoodMarketingGroup.com](http://GoodMarketingGroup.com)



SHANNON GOOD, PARTNER  
BRAD GOOD, PARTNER

# The Homeowner Experience

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# 4 STAGES

The experience is everything!

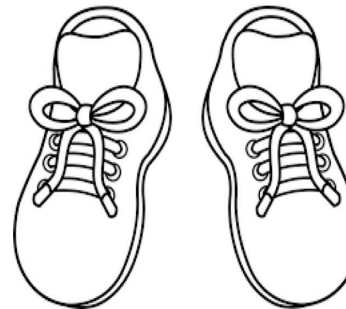
GOOD MARKETING GROUP

MAHPBA 2023

## Put yourself in THEIR shoes!

What is 'The Homeowner's Experience' with your company during the following stages...

- **SALE**
- **SERVICE**
- **REFER**
- **REPEAT**



EXPERIENCE:



# THE Sale Stage

Just the beginning  
of the  
experience!

GOOD MARKETING GROUP

MAHPBA 2023

## YOUR ENTRY INTO THE HOME

How Does the Homeowner  
Find Your Company?

What is Their First  
Impression?

How Do You Close  
the Sale in a  
Timely Manner?



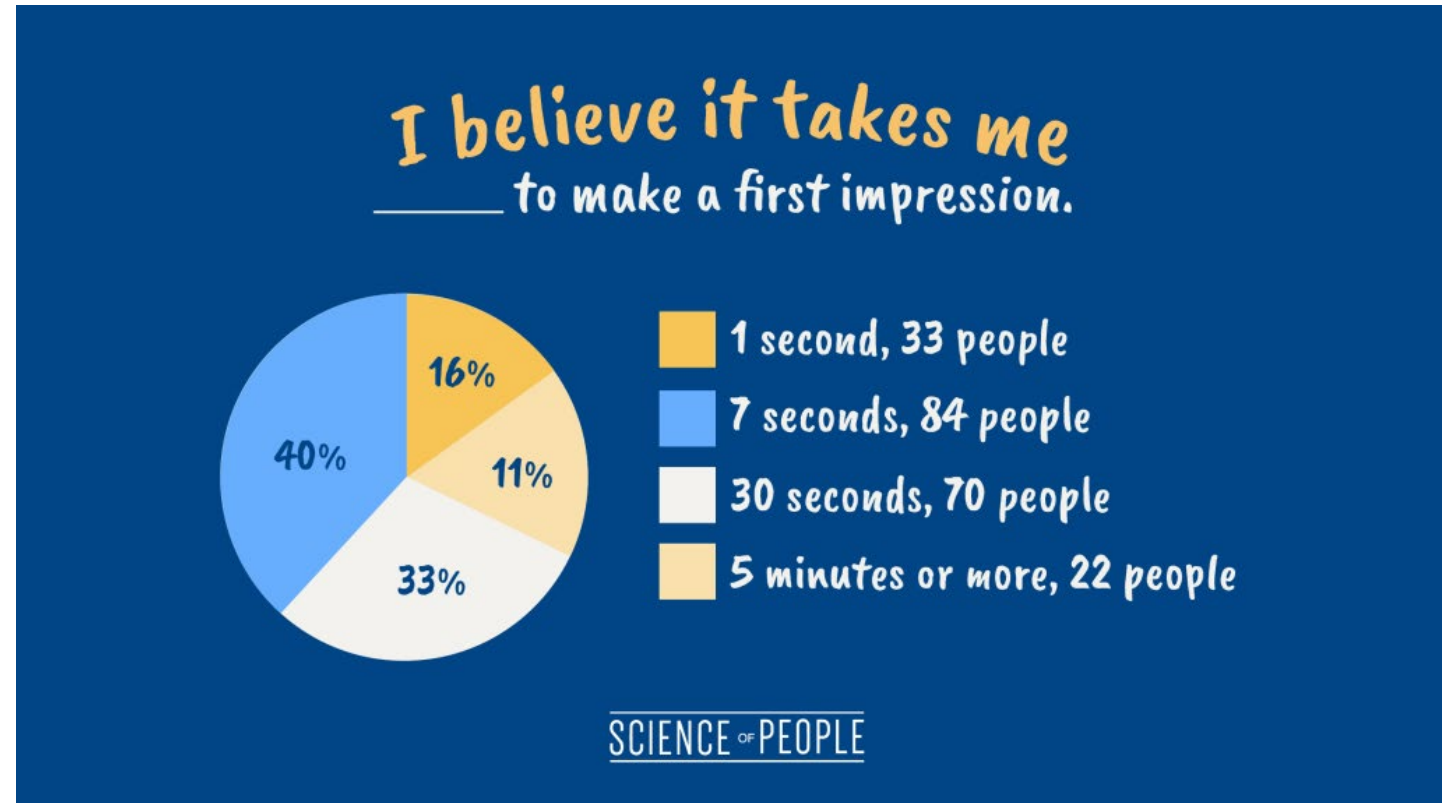
# THE Sale Stage

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# THE Sale Stage

40% of people say it takes them 7 seconds to make a first impression.



# THE Sale Stage - Sourcing

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*Website*

*Online Search*

*Social Media*

*Communications*

*Initial Contact*

*Word Of Mouth*

*Advertising*

*Reviews*

# THE Sale Stage - Sourcing

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## *Online Search*

**Direct Search:** visitors who reach your website directly vs. from a referring source

**Keyword Search:** search terms that people enter into search engines with the goal of finding a company that offers the products or services they are seeking.

**Google My Business:** free business listing from Google

**Social Media:** Facebook, Instagram, Twitter, etc posts are all searchable content

**Directory Profiles:** Yelp, MapQuest, HubSpot, yp.com, BBB, Merchant Circle, Yahoo...

**Home Service Directories:** Angi, Home Advisor, Houzz, Porch



# THE Sale Stage

## Online Search

### Results:

- Videos
- Images
- Ads
- Links: website, social media, directory listings

The screenshot shows a Google search for "replace my old fireplace". The search bar at the top contains the text "replace my old fireplace". Below the search bar, there are several search results:

- 17 Fireplace Remodel Ideas: Mantels, Inserts, and Tiles** (from <https://www.thisoldhouse.com>)  
1. Add Glass Fireplace Doors · 2. Get Your Firebrick in Shape · 3. Install a Mantel · 4. Opt for a Salvaged Mantel · 5. Add a Gas Fireplace · 6. Put in a Fireplace ...
- 21 Before-and-After Fireplace Makeovers with Cozy Charm** (from <https://www.bhg.com>)  
Oct 6, 2021 — These fireplace makeover ideas utilize new mantels, surrounds, built-ins, and more to turn an eyesore into a focal point.  
After: Rustic Fireplace... · Before: Rustic Fireplace · After: Glowing Fireplace...
- Fireplace-Replacement-Guide-Day-or-Night.compressed.pdf** (from <https://www.dayornightplumbingandfireplace.com>)  
Installing a fireplace insert is an easy fix. Additionally, you may find that your old, open air fireplace is a safety concern for your family if you have small ...  
39 pages
- How to replace your old open fire with a new efficient gas ...** (from <https://www.escea.com>)  
The first thing you need to do is to make sure you have the cavity space available. An installer or salesperson will need to measure the existing fireplace, ...
- Fireplace Makeovers On a Budget** (from <https://www.direct-fireplaces.com>)  
Apr 21, 2020 — Ways to update an old gas fireplace · Upgrading to a new electric fire · Replacing your old fire surround · Painting or staining your fireplace and ...
- Gas Fireplaces: When to Repair vs. Replace | Heat & Glo** (from <https://www.heatnglo.com>)  
A remodel or update to your current home: A new look or a new room function may trigger a fireplace repair or replacement (for example, turning a former guest ...  
Where To Start And What To... · When To Repair A Gas... · When To Replace A Gas...

On the left side of the screenshot, there is a vertical sidebar with a Google logo and several video thumbnails with their durations: 3:56, 5:36, 9:22, and 10 key.

# THE Sale Stage - Sourcing

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## Online Search

**CLAIM ALL OF YOUR  
ONLINE PROFILES!!!**



# THE Sale Stage - Sourcing

## Website

**Website speed:** Google recommends....

**Optimized:** for ALL mobile devices

**Images and Videos:** we are a visual society! AND = good SEO

**Content:** relevant, skimmers and readers, no sales pitches, hyperlinks...

- urges visitors to click deeper & stay longer

**Layout & White Space:** NOT too many graphics, white space = open space

**Reference Google Analytics:** most popular pages, keyword searches, geography, length of time on site, traffic sources

**Loading Time** = within 3 seconds (*2 seconds if ecommerce!*)  
**2-3 second mark is where bounce rates skyrocket!**  
40% of consumers will wait no more than 3 seconds  
before abandoning site.

# THE Sale Stage - Sourcing

Aug 16

Website

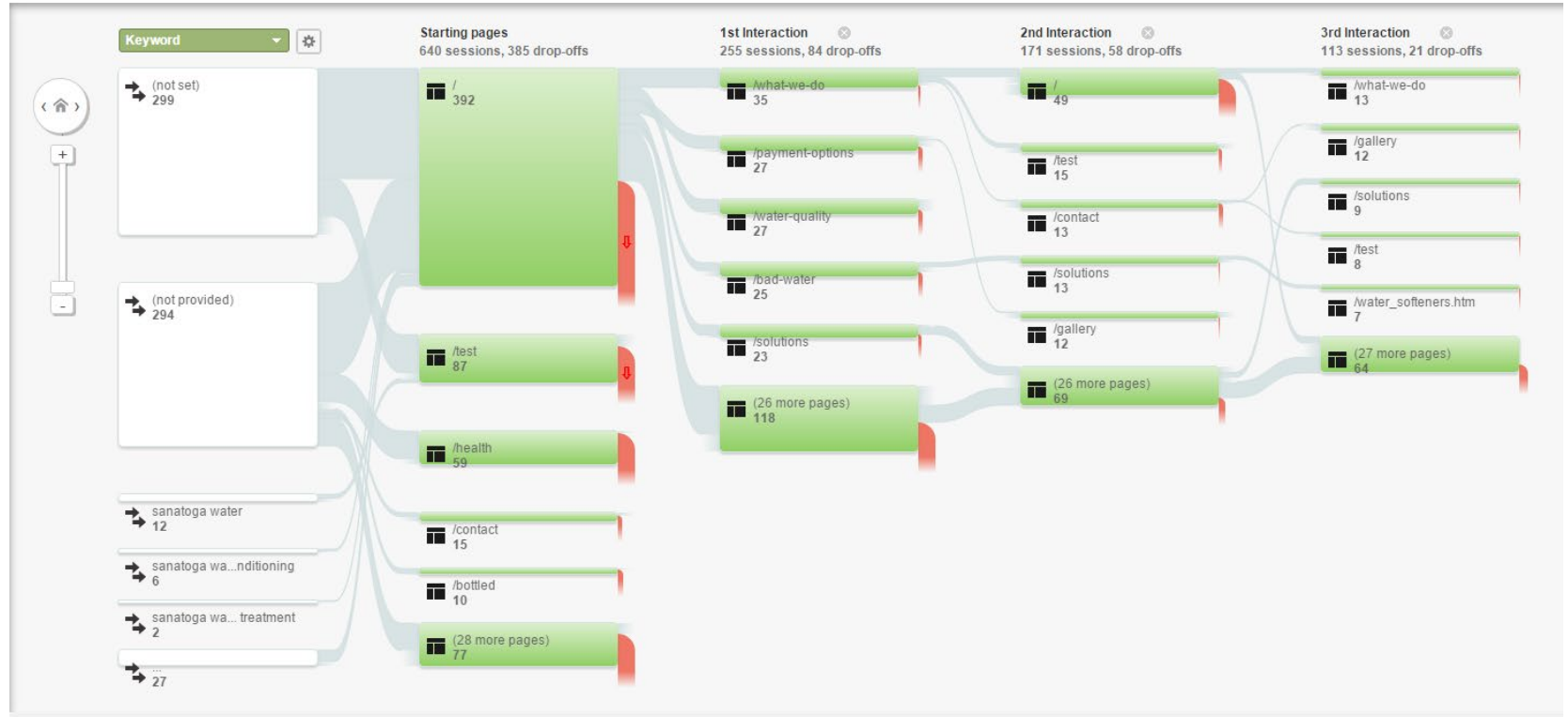
Google Analytics

## Behavior Flow

Automatically Grouped Pages | Level of Detail | Export

All Sessions  
100.00%

+ Add Segment



# THE Sale Stage - Sourcing

Website



"Where Details Make The Difference"

Rettinger Fireplace Systems, Inc

Customer Portal Call Us! 856-783-5501



Start Your Project

Shop

Services

Get Inspired

Blog

About

Contact

Where Details  
Make the  
Difference

Homeowners

Start Your Project

Get Inspired

See Our Portfolio

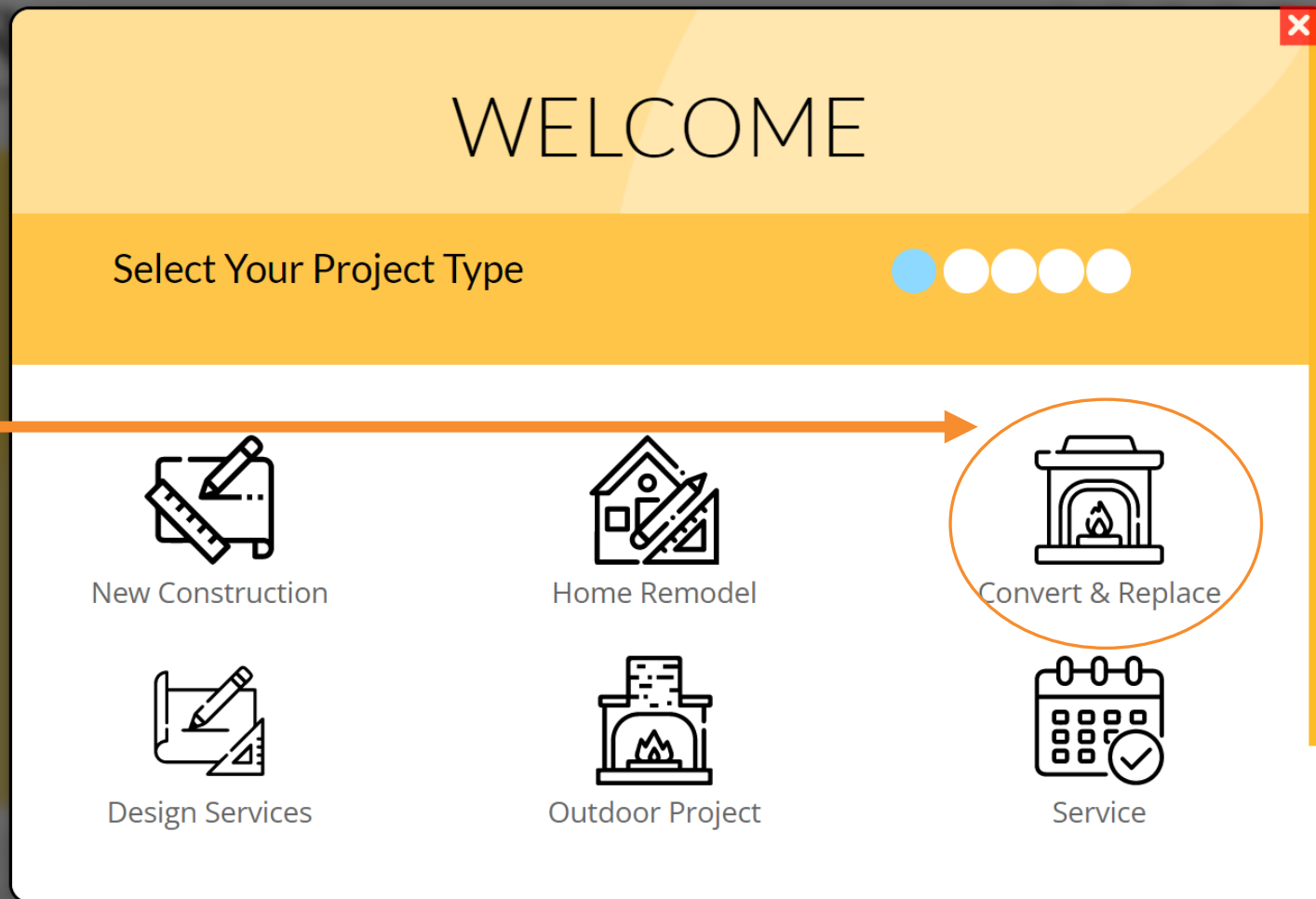
Save Now!

On select fireplaces appliances.

Learn More

# THE Sale Stage - Sourcing

*Website*



# THE Sale Stage - Sourcing

Website

WELCOME

Select Your Fuel Type

Gas

Wood

Pellet

Electric

Do you have a masonry fireplace? \*

Yes  No  Not Sure

Back Next

# THE Sale Stage - Sourcing

Website



Customer Portal Call Us! 856-783-5501



Start Your Project ▾ **Shop ▾** Services ▾ Get Inspired ▾ Blog ▾ About ▾ Contact ▾



## Fuel Type

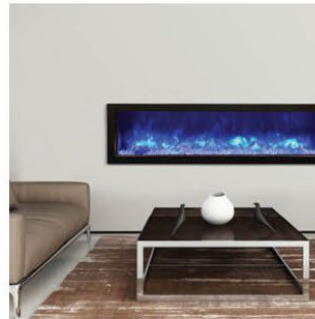
- Electric
- Gas
- Wood

## Hearth Style

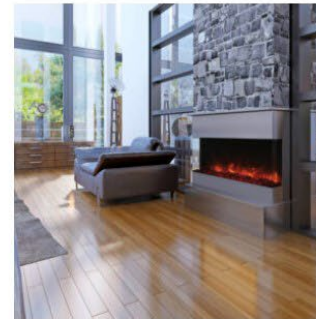
- Burner
- Burners
- Custom
- Fire Pit
- Fireplace
- Gas Logs
- Insert
- Outdoor
- Stove
- Stoves

## Orientation Style

Showing 1-12 of 203 results



Amantii Panorama Series



Amantii Tru-View



Ambiance FP 36





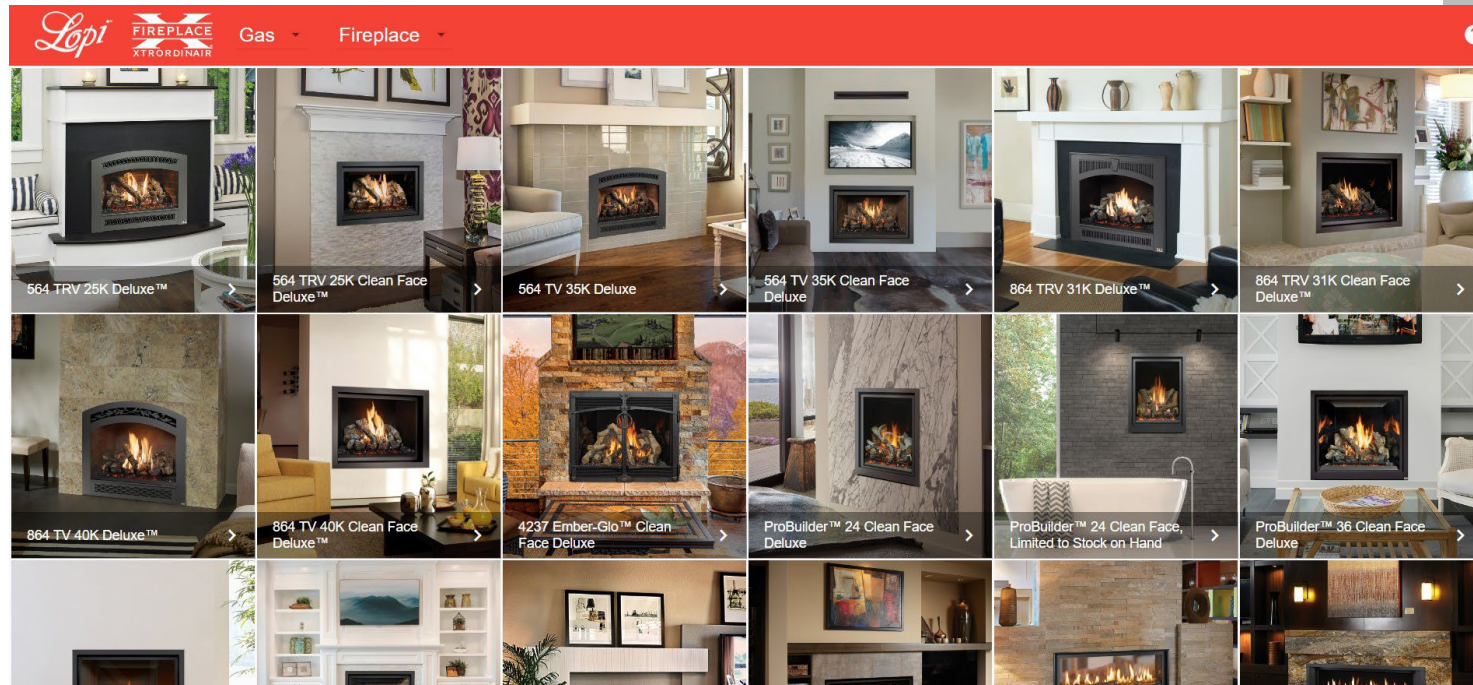
# THE Sale Stage - Sourcing

Website

Customer Portal Call Us! 856-783-5501

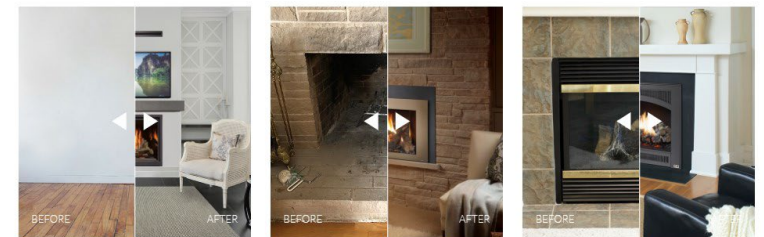


Start Your Project ▾ Shop ▾ Services ▾ Get Inspired ▾ Blog ▾ About ▾ Contact ▾



Find your scenario below to see the fireplaces that could work in that space

Not sure what you have? [Check out this video.](#)



Blank Wall

Open Fireplace

Sealed Fireplace



# THE Sale Stage - Sourcing

Website

## 2. Chimney Top Capping

Learn more about your Inspection Chimney Top Capping recommendations by following your inspection report and clicking below to find the matching service...



Chase Cover

View Product



Chimney Pots

View Product



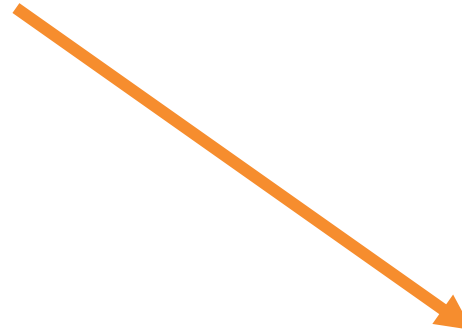
Concrete Crown

View Product



Crown Sealing

View Product



# THE Sale Stage - Sourcing

## Website



Chase covers are metal pans made out of galvanized steel, stainless steel, or copper fitted on the top of chimney chase like a roof to prevent water from entering into the structure. We fabricate, install, & replace these components.

[610-847-2530](tel:610-847-2530)

[Request a Quote](#)

"\*" indicates required fields

### LET'S GET STARTED

If you are interested in learning more about this product, please fill out the form below and one of our staff members will contact you.

*\*Items marked with an asterisks (\*) are required, please.*

**Purchase Type \***

First-Time Purchase

**Project Timeline \***

Right Away

# THE Sale Stage - Sourcing

Website



Customer Portal Call Us! 856-783-5501



Start Your Project ▾ Shop ▾ Services ▾ Get Inspired ▾ Blog ▾ About ▾ Contact ▾



Stove in Shamong

Completely satisfied with my rettinger product. I had a Osborne matrix insert installed in my fireplace. From Dan the salesman to Dave the inspector and Mitchell and his helper for the installation, every aspect was easy and efficient and seamless. A very professional organization and I could not be happier

Sandra F.



Fireplace in Atco

We just can't say enough about the entire team at Rettinger Fireplace, top notch service from sales and finance to installation and management. Not only do they carry the best products, but they are also extremely knowledgeable and can assist on selection and installation options. Always pleasant and professional, they make the entire process easy and enjoyable! This was our second Rettinger fireplace and custom mantle purchase, and if we are ever in the market again, they will be our first call!

terri j.

Location

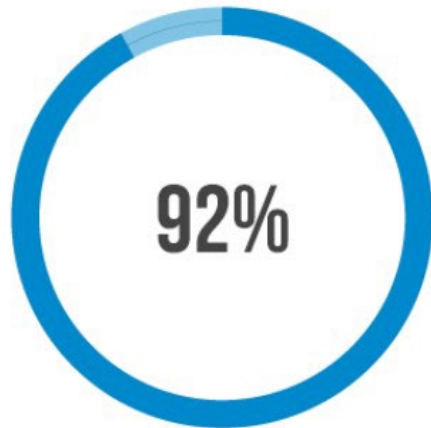
476 Centennial Blvd.  
Voorhees, NJ

Directions



# THE Sale Stage - Sourcing

## Word Of Mouth



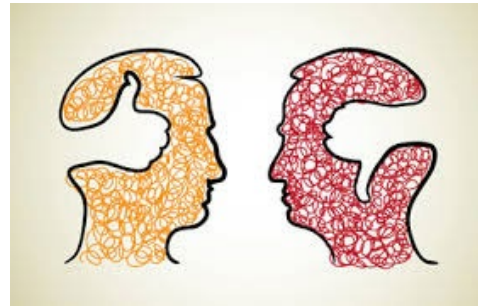
**92% OF CONSUMERS  
TRUST REFERRALS  
FROM PEOPLE THEY  
KNOW. - NIELSEN**



# THE Sale Stage - Sourcing

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## Reviews



### Top 5 Do's:

- Apologize
- Use as opportunity
- Respond to all reviewers
- Use proper spelling, grammar & punctuation
- Monitor other sites & monitor for a reply to your reply

### Top 5 Don'ts:

- React
- Duplicate replies – bad or good
- Pay for reviews
- Ignore reviews – bad or good
- Worry or Obsess

# THE Sale Stage - Sourcing

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*Social Media*

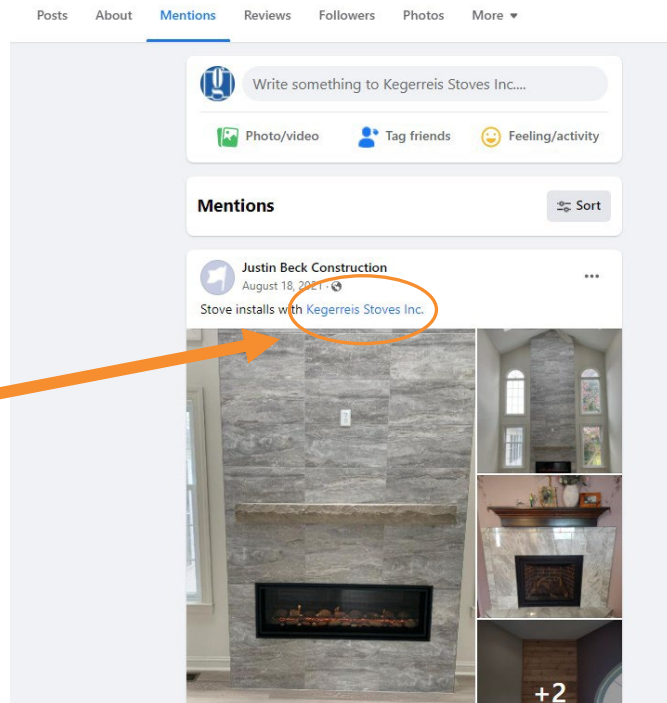
**Be the Expert**

**Be Reliable**

**Be Everywhere!**

# THE Sale Stage - Sourcing

## Social Media



Tips for getting your yard ready for the summer 🌞

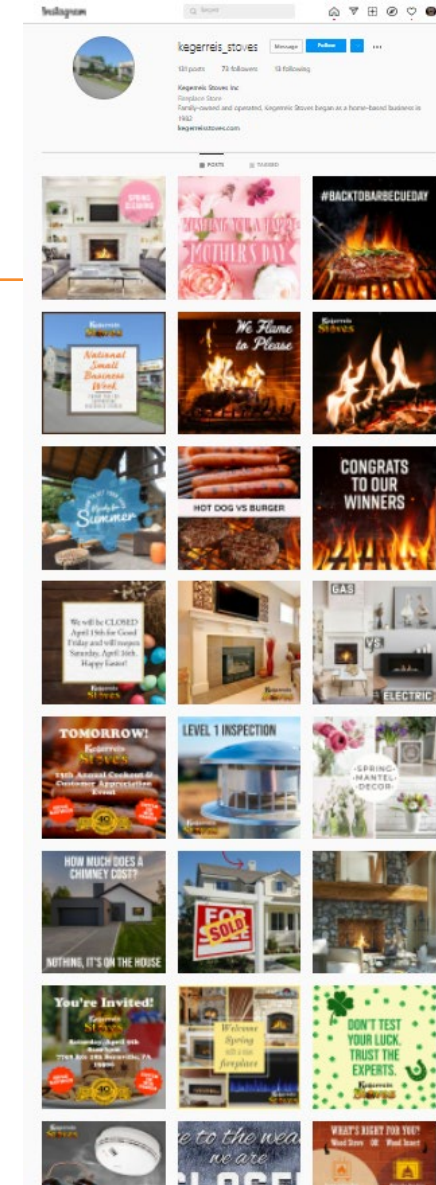
👉 Add furniture! Creating a comfortable environment will take your yard to the next level ✓

👉 Add lighting! Not only will this help with walking in the dark at night, but it will also add ambience and can completely change the feel of your yard. Guests will return again and again!

👉 Give us a call to install a new outdoor fireplace! We can help turn your yard into your dream outdoor living space!

<https://kegerreisstoves.com/.../outdo.../outdoor-fireplaces/>

#OutdoorLiving  
#OutdoorFireplace  
#KegerreisStoves  
#BernvillePA  
#BerksCountyPA





# THE Sale Stage - Sourcing

## Social Media



Sylvia Jonathan recommends [redacted] February 23

Bob conducted a free chimney inspection when we were in escrow on this house and provided a bid for the many needed corrections. We hired them a couple months later once we closed on the purchase, and with a few hiccups due to unexpected material needs, the crew finally finished. We were informed throughout the process and Austin and his coworker was great to work with. They were neat, polite and conscientious. They worked hard and we are happy with the outcome. Could definitely recommend this company.

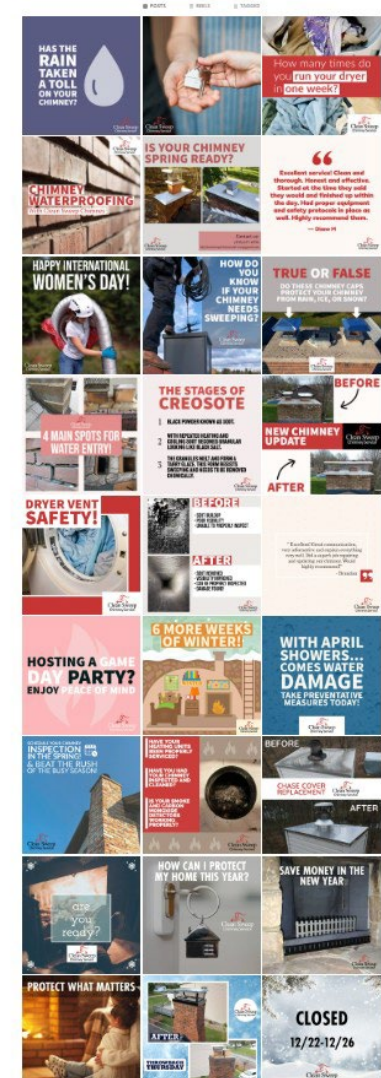


1

Staining can tell a lot about what is going on inside and outside of a chimney! 😊

Have you been noticing:

- Dark staining
- White staining... See more



# THE Sale Stage - Sourcing

## Social Media

 Woodheat Specialists DBA : The Chimney Doctors  
March 8 · 🌐


March 8th is International Women's Day!  
We would like to show appreciation to all of the women at The Chimney Doctors 😊

Learn more about us using the link below 📌  
<https://www.thechimneydoctors.com/about...> See more




**HAPPY INTERNATIONAL WOMEN'S DAY!**

 The Chimney Doctors  
Custom Fireplaces  
Your Full Service Chimney & Hearth Specialists

 Allegiance Chimney Solutions  
Published by SocialPilot · December 20, 2021 · ⚙️

🌟 Congratulations to Vivian Reyes and Allegiance Chimney Solutions for winning the 2021 BBB Spark Award. 🌟  
We are proud to accept @BBBMidTN honor 2021 Spark Award and honored to be recognized as a marketplace role model for cultivating Character, Culture and Community in everything we do! 🎉  
The Spark Awards, an award for entrepreneurship, recognizes business owners 35 and younger or business owners of any age operating for less than three years, who demonstrate a higher level ... See more



# THE Sale Stage - Sourcing

Advertising

Volume 22, Issue 2  
November/December 2021

## Best of HOUSE & HOME

Preferred Home Improvement

Your go-to company for exceptional exterior remodeling services page 31

**BEST OF H&H 2021 Sponsors:**

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How to plan your best outdoor space page 19

**ASK THE EXPERT** GEHMAN DESIGN REMODELING  
How to plan a remodel that fits your lifestyle page 29

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H&H  
ask the expert  
by Matt Cosentino

### Expert: HOME RENOVATIONS

PA-297 | 355 Main St. | Harleysville, Pa. (215) 513-0300 | [GehmanRemodeling.com](http://GehmanRemodeling.com)

## Gehman Design Remodeling

**F**OR MOST OF US, HOME IS WHERE WE'RE MOST COMFORTABLE, BUT THAT DOESN'T MEAN WE WOULDN'T LIKE TO SEE SOME SIGNIFICANT CHANGES IN IT FROM TIME TO TIME TO BETTER SUIT OUR LIFESTYLE. Perhaps the children are getting older, a playroom or teen hangout. Or maybe the dated kitchen is not hosting large gatherings anymore and the moment for some much-needed updates has finally arrived.

Tackling a renovation to better fit the homeowners' current lives is no small task, and design-build firm with years of experience is also a must, and that's where Gehman Design Remodeling enters the picture. After three decades of business in remodeling kitchens and baths, House & Home spoke with Dennis Gehman, MCR (Master Certified Remodeler), president of the company, to learn more about these types of projects.

**A HOMEOWNER'S LIFESTYLE CAN CERTAINLY CHANGE AS THE FAMILY DYNAMIC CHANGES, WHETHER THAT'S CHILDREN GETTING OLDER OR MOVING OUT. IS THAT WHEN A LOT OF PEOPLE LIKE TO REMODEL?**

Yes. Many of the homeowners we do major projects for are empty nesters. When they're raising their families, they may not have the extra disposable income to make the house the way they want it. They make it work for raising a family, but when the kids are out of the house and it's just a husband and wife, they want to invest in their home to enjoy it.

**WHAT ARE SOME OF THE IMPORTANT QUESTIONS YOU ASK EARLY ON TO DETERMINE THE DIRECTION OF THE RENOVATION?**

We need to know how many people are going to be living in the house, whether they have young children or teenagers. If it's a kitchen project, we want to know how many people are involved in food preparation and whether we need to allow room for more than one cook. A lot of it is asking questions in the flow of conversation, not in a drill-down list. Many people are not able to articulate what they want, but through conversation and getting to know them, it's our job to extrapolate that information and come back with a few design options that we think would work for them. We narrow it down to the one that is closest to what they want and work together to make it exactly what they want.

**PEOPLE SEEM TO FEEL STRONGLY ABOUT HAVING EITHER AN OPEN DESIGN OR SEPARATED ROOMS. IS THAT A BIG FACTOR IN A RENOVATION?**

People do have strong feelings about that. A lot of times it depends on how much entertaining they like to do. If they do a lot of entertaining, the person who's doing the cooking and food preparation wants to be involved in the conversation, so an open floor plan makes a lot more sense. If it's people who are mostly there by themselves, they don't seem to be as concerned about it. Overall, I would say about 75% lean toward an open floor plan.

**WHAT TYPES OF FLOORING ARE MOST OF YOUR CUSTOMERS INTERESTED IN?**

We're seeing very little carpet, at least on the first floor. In bedrooms there's still carpet, but on first floors it's almost always a hard surface. Generally speaking, most people's first choice is a hardwood of some kind, but that can definitely get expensive. When we show them samples of the vinyl planks—which look great and resemble real wood—they see that they can save at least 30% of the cost if we save. In open floor plans, you almost feel like you don't have a choice and the flooring should all be the same. When you have different rooms, you have the option to change flooring from room to room.

**DO CLIENTS WHO ARE EMPTY NESTERS ASK FOR FEATURES THAT WILL HELP THEM AGE IN PLACE?**

We probably bring it up more times than the homeowners. A lot of people still have in mind that if they do that it's going to look like a hospital or a nursing home. I think they're hesitant because that's not the look they want, but we're able to show them pictures of numerous projects we've done that are designed for aging in place.

It may be as simple as making sure the showers are wide enough in the bathrooms so you can enter with a wheelchair or a walker. We make sure we have solid wood blocking behind the tub and shower walls and behind the doorway near the toilet, so that if they ever need a grab bar, it can be installed without having to tear things apart. Many of the manufacturers now have towel bars that are anatomically railed to serve as a grab bar, so it doesn't look institutional. It looks nice but there is a safety feature. **H&H**

NOVEMBER/DECEMBER 2021 | HOUSE & HOME | 25

# THE Sale Stage - Sourcing

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*Initial Contact*

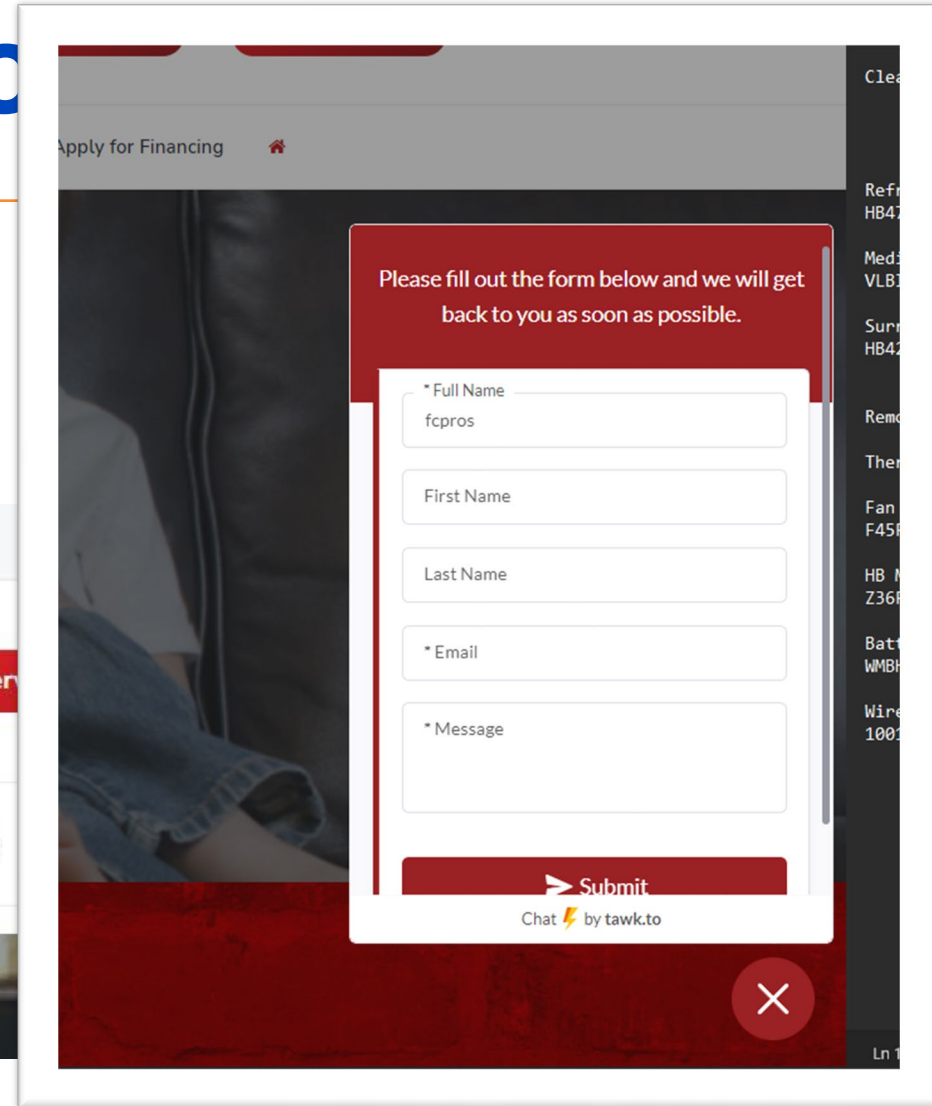
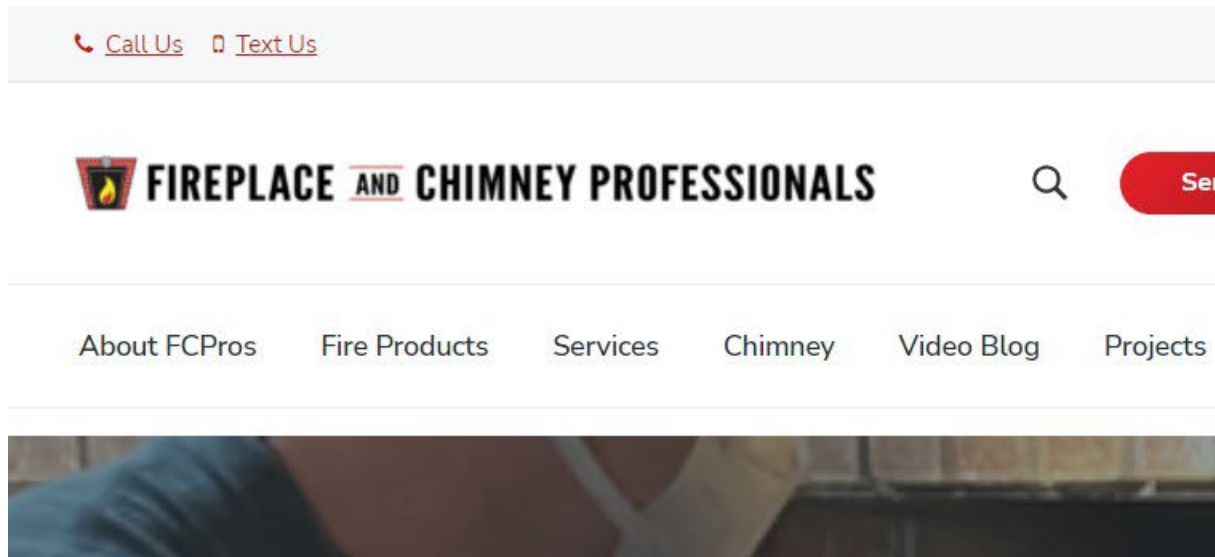
**All Types of Communication**

**Be Responsive**

**In a Timely Manner**

# THE Sale Stage - So

## Initial Contact & Communications



# THE Sale Stage - Sourcing

## Initial Contact & Communications

### Heat Your House With Style and Efficiency

Fireside & Chimney Pros sells, installs and services natural gas and propane fireplaces, inserts and stoves. These long-lasting appliances are among the highest rated for energy efficiency in the market, offering complete comfort and temperature control at the touch of your fingertips. Many of our clients enjoy the convenience of gas – no clean up, easy turn-on/turn-off in the cool spring mornings or late fall evenings!

#### BENEFITS OF GAS APPLIANCES:

- Gas offers High Efficiency heating.
- Both Gas and Propane are extremely Green sources of energy.
- Natural gas stoves or inserts fit into many different decors.

WHAT ARE THE DIFFERENT TYPES OF HEARTH APPLIANCES?

REQUEST A CONSULTATION

Product Request a Quote

**Name (Required)**

First Last

**Phone (Required)** **Email (Required)**

**Project Type**

Convert Wood to Gas

Replace/Update Fireplace

Add a New Fireplace (blank wall)

Add a New Fireplace (additional room)

New Construction

Not Sure

**Project Timeline**

Ready to get started

Sometime this year

Sometime next year

Just Dreaming

**Are you also interested in:**

Outdoor Fire

Fireplace Doors / Screen

Mantel / Shelf

Fireplace Surround

Fireplace Tools / Accessories

**Share photos of your current fireplace or area you want to install a new appliance:**

Drop files here or

# THE Sale Stage – Follow-up

## Communications

### Email Etiquette:

- Reply to all your emails
- Always proofread before pressing send
- Use professional greetings
- Use a company domain email address – FYI: don't use gmail!
- Include links to your website and reviews, as well as social media platforms
- Include your certifications and state licenses (if applicable)

Thank you,

Joshua Brosius

Certified Master Chimney Technician #34

& Certified Chimney Professional #546

Certified Chimney Reliner #94

Certified Dryer Exhaust Technician (CSIA) #1149

Certified Chimney Specialist (CSIA) #59

Certified Chimney Sweep (CSIA) #10020

Certified Hearth Design Specialist and Certified Fireplace Installer (National Fireplace Institute) #177069

Licensed HeatShield Installer

**Always A Sweep: Chimney and Dryer Vent Service, LLC**

"It takes less time to do a thing right, than it does to explain why you did it wrong." - Longfellow

"Facts are stubborn things; and whatever may be our wishes, our inclinations, or the dictates of our passion,

352-282-0158

[alwaysasweep.com](http://alwaysasweep.com)



# THE Sale Stage – Lead Chaser

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## *Communications*

THEN...

- 3 MONTHS LATER
- 6 MONTHS LATER
- 12 MONTHS LATER

**CREATE LIST BUCKETS!!**

**USE AUTOMATION!!!**





# THE Sale Stage

## Communications

GIVE OPTIONS!

PERSONALIZE!!

USE AUTOMATION!!!

The screenshot shows a website for 'FIREPLACE AND CHIMNEY' with a form titled 'Let's Get Started!'. The form includes a header with the company logo and a background image of a fireplace. The main text reads: 'We are excited you've chosen FCPros for your new project. Please fill out the form below and then we will contact you shortly to discuss next steps.' The form fields are: 'First Name' and 'Last Name' (two input boxes), 'Email \*', 'Phone Number', and 'Mobile Phone' (three input boxes), 'When Would You Like to Start Your Project?' (one input box), and 'When Would You Like to Schedule Your Deposit?' (one input box). Below the input fields is a 'Best Way to Contact' section with radio buttons for 'Mobile', 'Phone' (selected), 'Email', and 'Any / All'. At the bottom, there is a 'Best Time of Day to Follow Up' section with a checked box for 'before noon' and an 'I'M READY' button. An orange arrow points from the 'Communications' section to the 'I'M READY' button.

# THE Sale Stage

## Communications

GIVE OPTIONS!

PERSONALIZE!!

USE AUTOMATION!!!

**FIREPLACE AND CHIMNEY PROFESSIONALS**

Hi {firstName}

It's Matt with F...  
you. Feel free to...  
clarification.

Please let me know...  
communicate with...  
you are not ready...

Thank you for taking...  
home improvement...

- Matt Martinez

If you are ready to get your project started, click the "Let's Get Started" button below and I will contact you to review our next steps.

If you need more time...  
"Not Ready" button below...  
only follow up with you...  
to check in.

**I'M READY** **NOT READY**

## We understand.

Thank you for letting us know you are not ready to start your FCPro's project.

Please fill out the below form so we can pause any immediate and future emails or calls to you. If you change your mind, please call us back.

First Name  Last Name

Email

### A Final Few Questions

Why aren't you interested?

- Budget
- Project Timeline
- Life Got In The Way
- Another Contractor / Second Opinion

Can we follow up with you again?

- Yes, in 6 months
- Yes, in 12 months
- No thanks

**SUBMIT**

# THE Sale Stage

## Communications

GIVE OPTIONS!

PERSONALIZE!!

USE AUTOMATION!!!

Thank You for  
the Opportunity.

Thank you for letting us know you are not interested in our proposed solution.

Please fill out the below form so we can pause any immediate future emails or calls to you. If you change your mind, please call us back.

First Name

Last Name

Email

**A Final Few Questions**

Why aren't you interested?

- Budget
- Project Timeline
- Life Got In The Way
- Another Contractor / Second Opinion

Can we follow up with you again?

- Yes, in 6 months
- Yes, in 12 months
- No thanks

on your new project proposal.

e"},

s. I wanted to follow up on the estimate I quoted  
contact me if you have any questions or need

your status on the project so I can be sure to  
you appropriately. I don't want to bother you if  
get started.

portunity to earn your business and make your  
dreams a reality.

FCPro

ck the  
will  
odically

If you don't think you are interested  
in pursuing your project after all,  
click the "Thanks Anyway" button  
below and I will not contact you.

**THANKS ANYWAY**

# THE Service Stage

The experience doesn't end after the SALE!

GOOD MARKETING GROUP

MAHPBA 2023

# *Communication DOESN'T STOP After The Sale!*

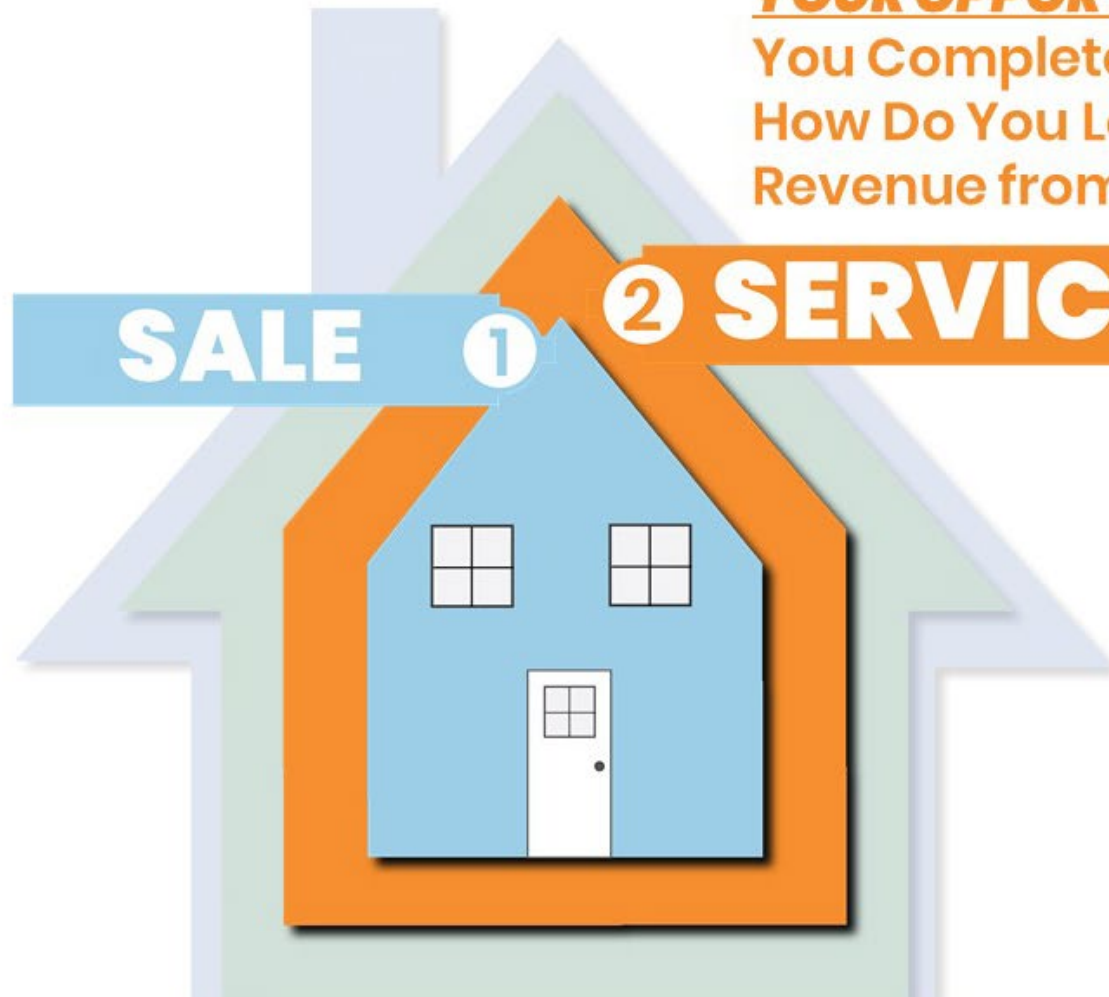


# THE Service Stage

The experience doesn't end after the SALE!

GOOD MARKETING GROUP

MAHPBA 2023



**YOUR OPPORTUNITY TO RETURN**  
You Completed a Sale.  
How Do You Leverage Continued  
Revenue from the Customer?

# THE Service Stage-Internal

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## *Communication Between Sales Team & Service Team*



# THE Service Stage-Internal

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## *Communication Between Sales Team & Service Team*

**Client Discovery:** Salesperson and Service Lead share Homeowner traits:

- Personality
- Likes & Dislikes
- Preferred Communication
- Timeline & Expectations
- Something Special

**Project Updates:** Internal Communication - keep both teammates in the loop

# THE Service Stage-Build Relationships

---

## *Communication with Customers*

### **Emails:**

- Introduction email: confirm project highlights, timelines & expectations
- Appointment Reminders (*installation and service*)
  - ✓ scheduled confirmation
  - ✓ 5 days prior
  - ✓ day before

### **Texts and/or Phone Calls – GET PERSONAL!**

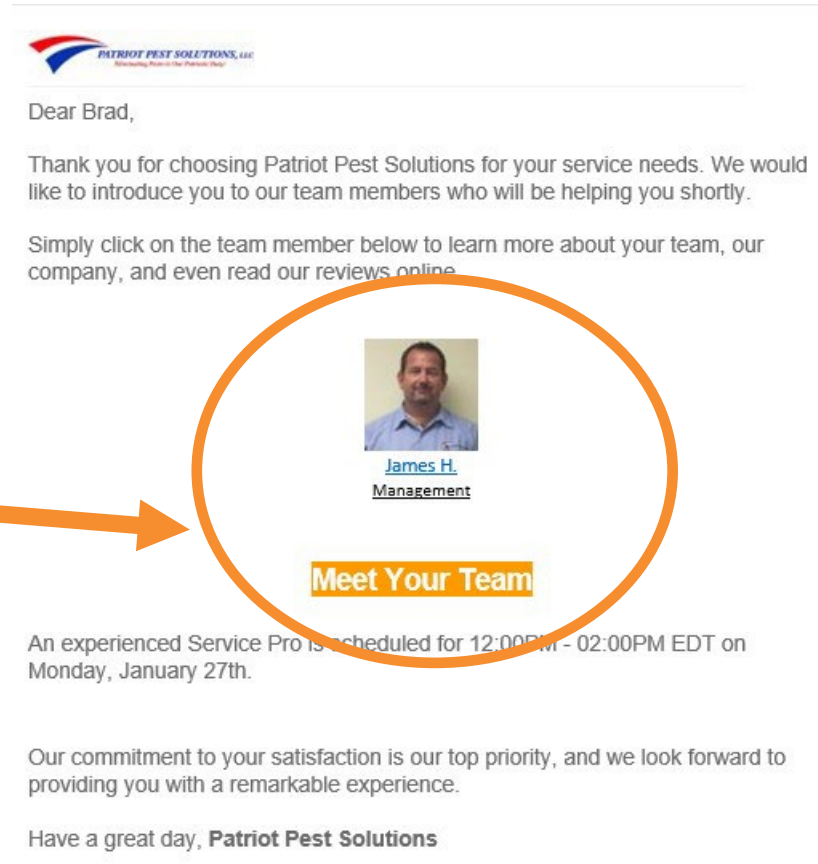
- Introduction call
- Voicemail Appointment Reminders (*installation and service*)





# THE Service Stage-Build Relationships

*Communications  
Manage  
Expectations  
-via email/text*



# THE Service Stage-Build Relationships

---

*Communications*

*Builds Trust*

*-on website*



Jeff Zeek

Mario Gamboa

- Installer

Mario joined Hearth & Home in 2018 after a history of working with his hands. He quickly became an expert in fireplace service and installation and his attention to detail is what makes him perfect for this role.



Casey Pudlo

# THE Service Stage-Build Relationships

---

*Communications = Education*



# THE Service Stage-Branding

## Branding

### Appearance:

- Trucks
- Attire



# THE Service Stage-Branding

## Branding

### Appearance:

- Trucks
- Attire
- Business cards
- Leave behinds: flyers, manuals (*include logos, contact information, v*



# THE Service Stage-Branding

## AND DON'T FORGET

### Before Beginning:

- Introduce self as teammate of company
- Confirm reason for being there (before entering home)
- Look Homeowner in the eye!
- Be polite and respect home
- Take a photo of the "Before"
  - ❖ Remove personal references (ie. family photos)
- Take after photo same angle
  - ❖ Landscape (vs. portrait/up-down)



# THE Refer Stage

The experience continues!



# THE Refer Stage

The experience continues!





# THE Refer Stage

---



# THE Refer Stage

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## *How'd We Do?*

**Before you leave:** Service Team Member must:

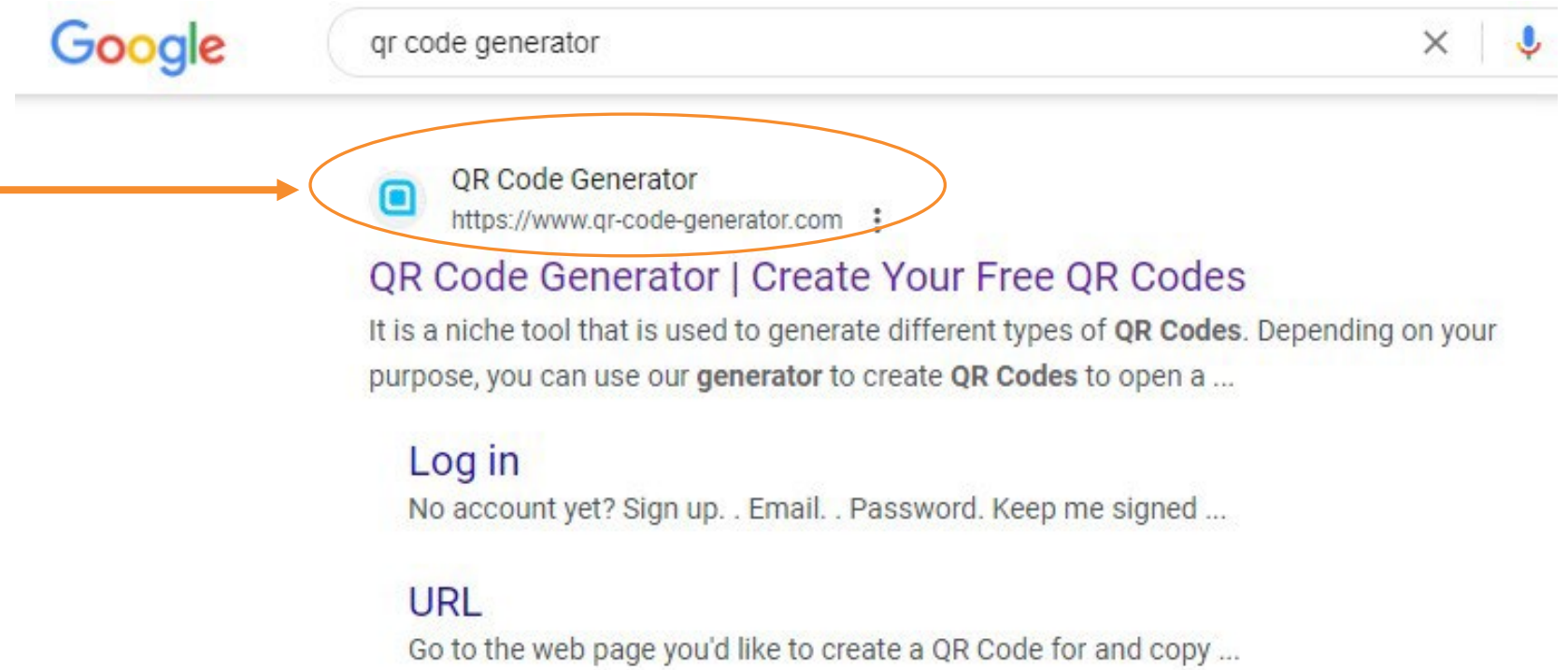
- Clean up
- Take an After picture (same direction as Before picture)
- Ask Homeowner if they are happy!
- Go over instructions and materials
- Go over contact information for future communications
- Share Links/Handles/Profiles to give Review



# THE Refer Stage

---

*How'd We Do?*



The image shows a Google search interface. The search bar contains the text "qr code generator". Below the search bar, the first search result is highlighted with an orange oval and an orange arrow pointing to it from the left. The search result is for "QR Code Generator" with the URL "https://www.qr-code-generator.com". Below the search result, there is a description: "QR Code Generator | Create Your Free QR Codes. It is a niche tool that is used to generate different types of QR Codes. Depending on your purpose, you can use our generator to create QR Codes to open a ...". There are also links for "Log in" and "URL" with their respective descriptions.

Google

qr code generator

QR Code Generator  
https://www.qr-code-generator.com

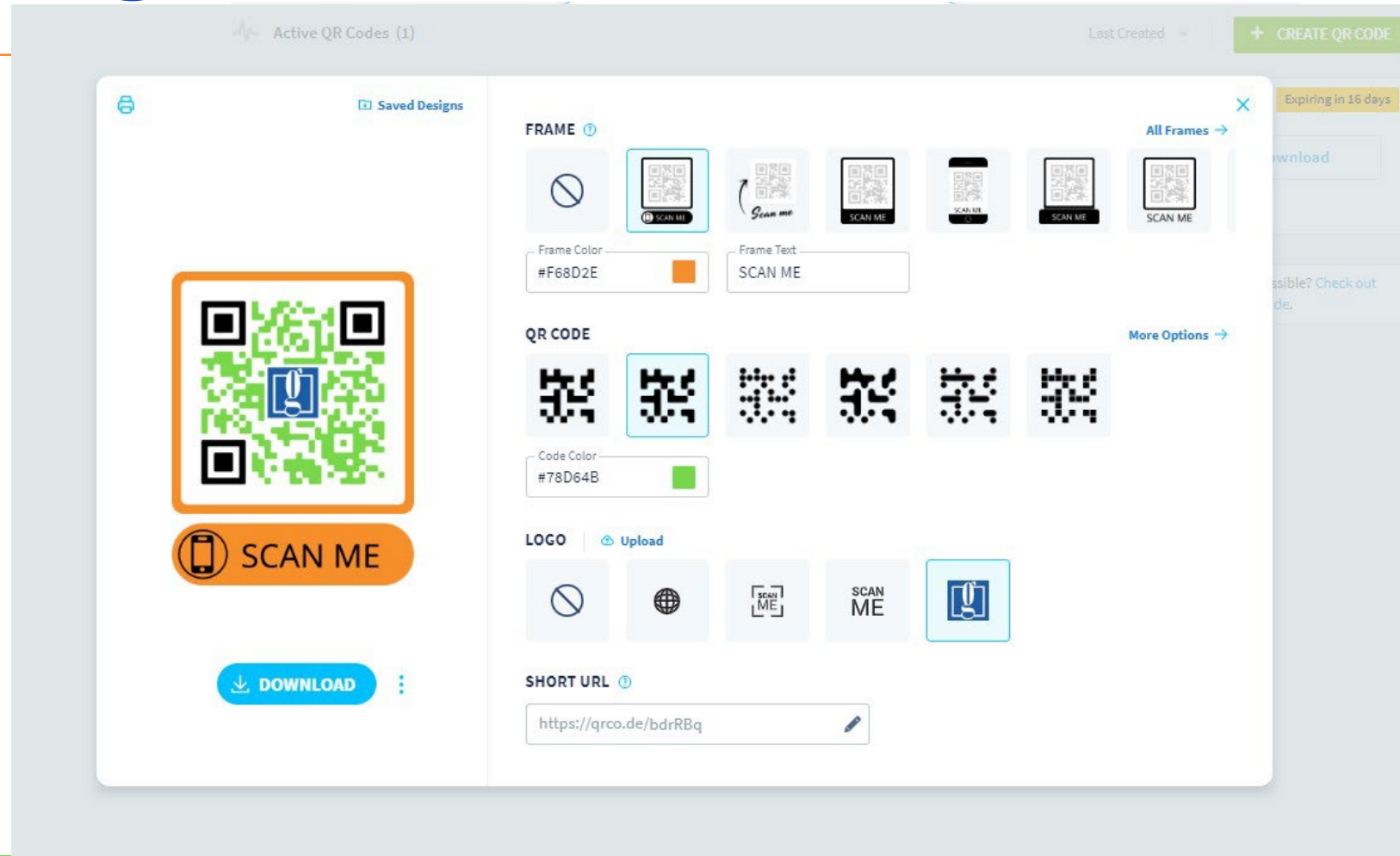
QR Code Generator | Create Your Free QR Codes  
It is a niche tool that is used to generate different types of **QR Codes**. Depending on your purpose, you can use our **generator** to create **QR Codes** to open a ...

Log in  
No account yet? Sign up. . Email. . Password. Keep me signed ...

URL  
Go to the web page you'd like to create a QR Code for and copy ...

# THE Refer Stage

*How'd We Do?*



# THE Refer Stage-Reputation Mgmt

*How'd We Do?*



★★★★★  
Great service! Very quick to respond. Very thorough assessment.  
Alan T in Nashville  
Service

★★★★★  
Allegiance did a thorough and professional job of getting our two fireplaces and chimney safe again. They were also fairly priced. We have confidence in the work they did and look forward to many more years of enjoying our fireplaces.  
Jamie C in Columbia  
Service

★★★★★  
Good job very knowledgeable and professional thanks guys

### Leave a Review

Name \*

First

Last

Email \*

Town \*

Subject \*

Sales

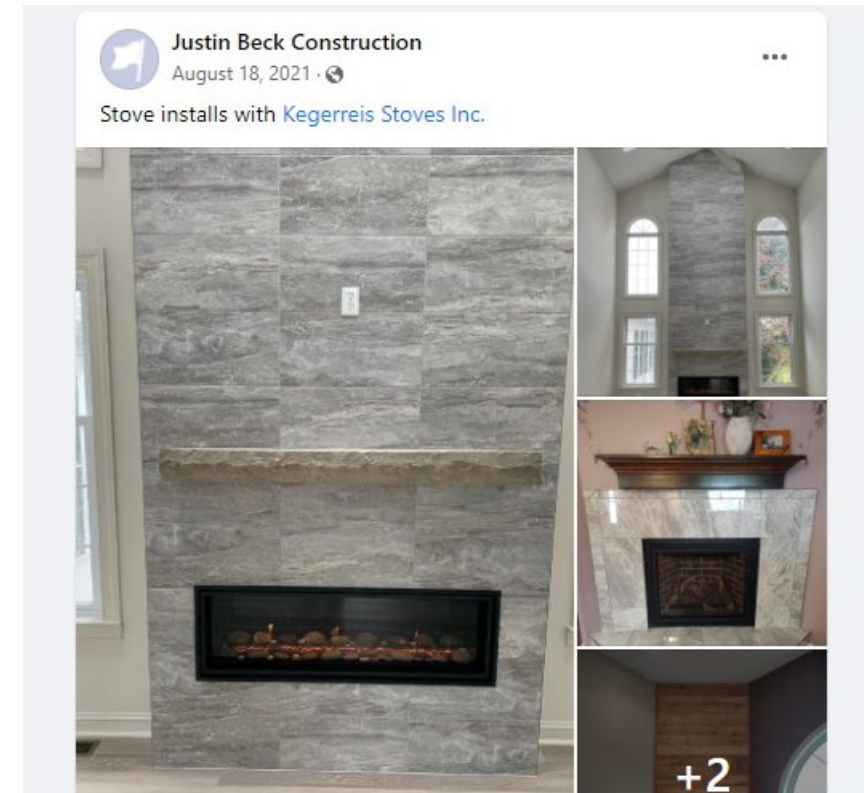
How Many Stars? \*

# THE Refer Stage

## How'd We Do?

### After you've left w/in 24 hours:

- Send Thank You email with documents (ie. pdfs that support instructions discussed)
- Ask Homeowner to "Like" (follow) on social media
- Ask Homeowner to "recommend" by tagging @
  - ✓ On their page
- Recommend your company to friends/neighbors
- ***Request a testimonial, BUT...***

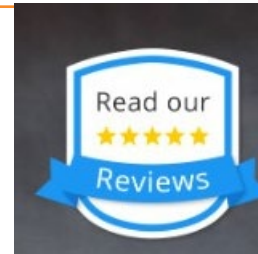


# THE Refer Stage-Repu

## How'd We Do?

### Testimonials:

- Be aware of Review software that “owns” yo
- Be sure the testimonial is posted to your we



4.95 (312 reviews)

Lauren S.



Wonderful experience! Everyone was professional! They did a great job rebuilding my fireplace!

May 13, 2022

Sheri D.



Blade came on time ..did a good job and explained what he did.

May 13, 2022

Marie H.



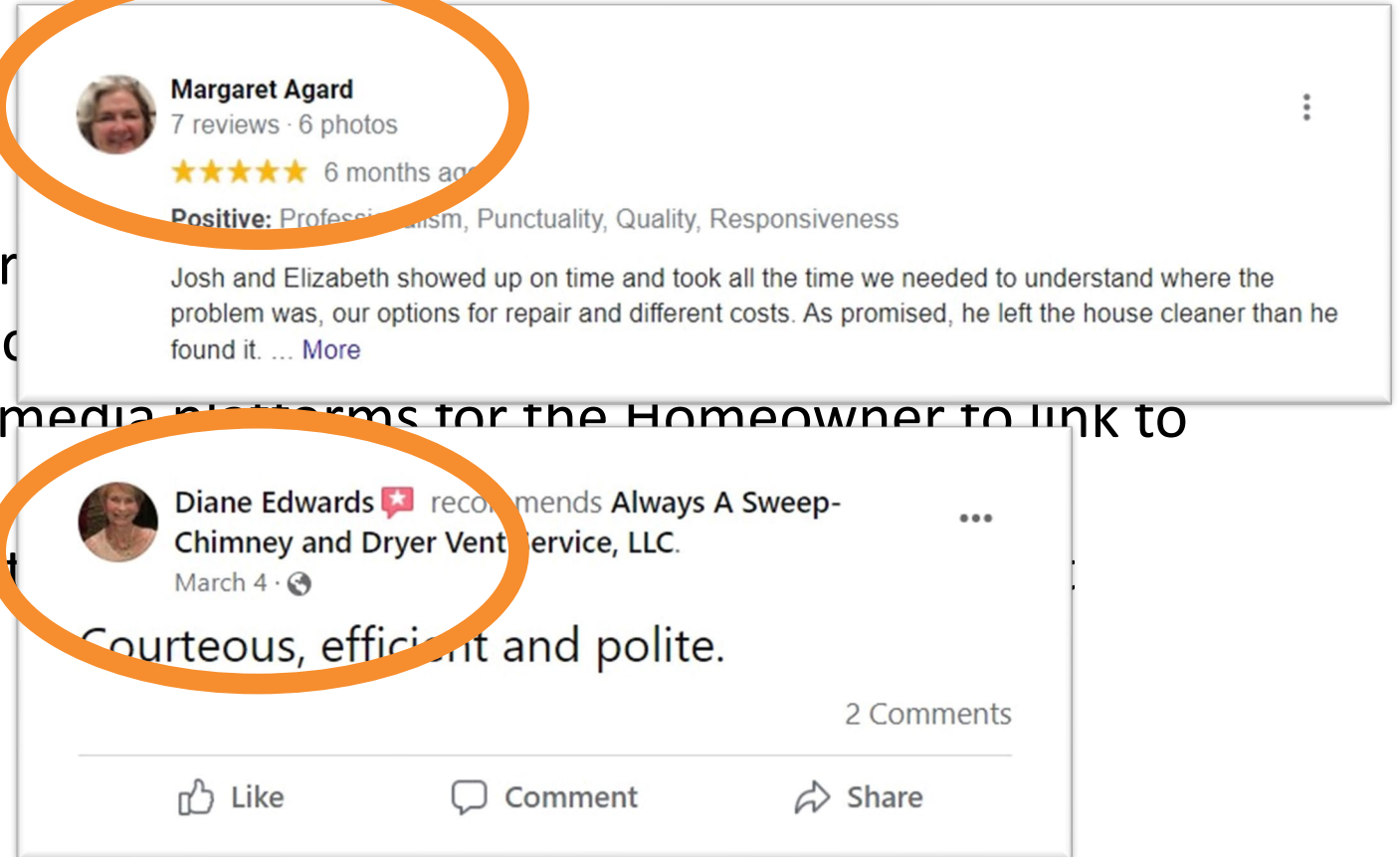
Great service!!! Cory was on time, very professional and honest. He took time to show me how to work my fire

# THE Refer Stage-Reputation Mgmt

## How'd We Do?

### Testimonials:

- Be aware of Review software
- Be sure the testimonial is posted
- Include links to your social media platforms for the Homeowner to link to as THEIR profile
- **DON'T** allow review software to post testimonials for you. They should be authentic!





# THE Refer Stage-Reputation Mgmt

## How'd We Do?

### Testimonials:

- Be aware of Review software
- Be sure the testimonial is positive
- Include links to your social media as THEIR profile
  - **DON'T** allow review software to be authentic!
- Monitor reviews regularly AND respond

The screenshot shows a Google Business Profile for 'Enchanted Fireside' with two reviews highlighted by stars. The first review is from Sharon Donovan, a 5-star review from 3 months ago, praising the installation of a Vermont Castings wood stove. The owner's response is: 'Thank you so much, Sharon! We appreciate your kind words! - Karen'. The second review is from John Lloyd, a 4-star review from 2 months ago, mentioning a gas fireplace installation in 2021 and a rough road that affected the rating. The owner's response is: 'Hi John, thank you for your feedback, and we truly appreciate your confidence and your business. We should have followed up after your December install (we want to hear it all - the good and the bad!), so I will see why that didn't ... More'.

# THE Refer Stage-Refer-A-Friend

---

## Referral Programs

- Offer a monthly drawing for gift card (ie. Gas Cards) IF...
  - ✓ New prospect mentions customer
  - ✓ Homeowner shares finished project on social media and tags your company
  - ✓ Homeowner/customer tags friend(s) in one of your social posts (ie. the Homeowner/customer's before/after project photo)
- Include "Share with Friend" in email communications

# THE Refer Stage-Refer-A-Friend

---

## *Referral Programs*

- Ask Homeowner to host an in-home “Home Improvement Party”



# THE Refer Stage-Refer-A-Friend

## Referral Programs

- Share your company support of relevant local and/or industry non-profit organization relevant on social media and website
- Raise \$\$ = more shares

Adopt a Pet  
Com



# THE Repeat Stage

---

The experience becomes the relationship!



# THE Repeat Stage

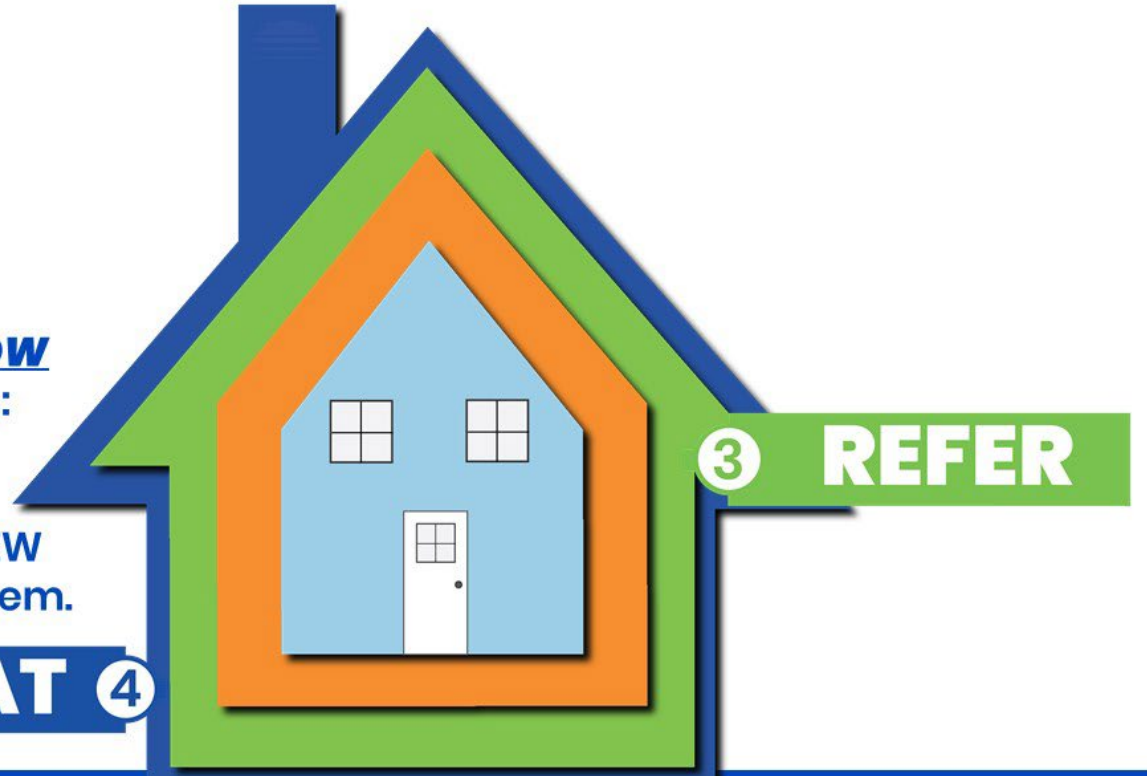
The experience becomes the relationship!

## **A MODEL TO FOLLOW**

Get More Business:  
Cross Marketing  
from Your Best  
Customers and NEW  
PROSPECTS Like Them.

**REPEAT** ④

③ **REFER**



# THE Repeat Stage

---

## *Continue Relationship*

**Continually update  
customer email  
addresses for future  
marketing.**

**USE TAGGING!!**



# THE Repeat Stage

---

## *Continue Relationship*

**USE AUTOMATION!!!**

**Cross Marketing:** Homeowner is low hanging fruit for additional sales:

- ***Gas Fireplace?***
  - Candidate for Gas Grill, Gas Fire Table
- ***Grill Sale?***
  - Candidate for Patio Furniture, Outdoor Fire Feature
- ***Hearth Appliance?***
  - Additional appliance in another room (*bathroom, kitchen, outside*)
  - *Service and/or Warranty Plan*



# THE Repeat Stage

## Continue Relationship

**Communication:** Stay in the forefront of their mind..

- Monthly newsletters
- Upcoming Sales/Promos
- Community Events
- Additional Touch
  - ✓ Anniversary of completed project – request updated photo and testimonial of experience since new fire appliance was installed
  - ✓ Holidays – request a photo of decorated new fire appliance



**DID YOU KNOW?**

**WE ALSO SELL SPAS & GRILLS**



While we are at your house servicing your hearth appliance, ask us about creating an amazing outdoor living space to enjoy with your neighbors & family this summer.

[CLICK TO CUSTOMIZE HOT TUB](#)



If you are a Grill Master, then you need to visit SOMD for your new gas, wood-fired pellet or charcoal grill.

[CHOOSE YOUR GRILL](#)

OR, [visit our showroom](#) to browse, touch, sit in and get a hands-on (not virtual) experience with our spas and grills. Then, consult with our team of outdoor living specialists who will help you make your dreams a reality!

# THE Repeat Stage

## Continue Relationship

### Customer Survey:

- Request feedback = Value opinions
- Update contact info
- Create special offer and/or cross-ma

Please rate the below experiences:

<p>Service Technician arrived at schedule time.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>	<p>Service Technicians were courteous and professional.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>
<p>Technicians were knowledgeable/informative about the product/services.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>	<p>Home/worksite was left neat and clean.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>
<p>Technicians thoroughly explained the operation and maintenance of a newly installed appliance.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>	<p>Office personnel were courteous and professional.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>
<p>Scheduling of service/installation was convenient and timely.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>	<p>Office staff was knowledgeable and communicated v</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>
<p>My overall satisfaction with Mace Energy Supply's service is high. I would recommend you to my friends.</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★★★</p> <p><input type="radio"/> ★★★</p> <p><input type="radio"/> ★★</p> <p><input type="radio"/> ★</p> <p><input type="radio"/> Not Applicable</p>	<p>How did you hear about Mace Energy Supply? (choos</p> <p><input type="checkbox"/> Friend/Neighbor</p> <p><input type="checkbox"/> Website</p> <p><input type="checkbox"/> Online Search (Google, Bing, Yahoo, etc)</p> <p><input type="checkbox"/> Social Media</p> <p><input type="checkbox"/> Trucks</p> <p><input type="checkbox"/> Other</p>

# THE Repeat Stage

---

## *Find More Like Your Best*

**SnapShot:** Use your customer list...

- Demographics
- Geography
- Purchase Levels
  - ✓ Type of purchase - \$\$\$ - \$\$,\$\$\$
  - ✓ Repeat Customers



# THE Repeat Stage

Find More Like Your Best

Marketing Efforts: Determine ROI...

- Purchase qualified list

## GROUP 15M

### MATURE WEALTH

GROUP 15M MATURE WEALTH HOUSEHOLDS: 4,919,200 (3.97% OF U.S.)

CLUSTERS: 02 Established Elite  
03 Corporate Clout

INFOBASE-X® DEMOGRAPHIC CHARACTERISTICS  
LIFE STAGE GROUP 15M—MATURE WEALTH

#### ABOUT MATURE WEALTH

The two clusters of Group 15M, "Mature Wealth," exhibit peak wealth, generated from cohorts who span between the ages of 46 and 75. As expected, such households are often to be found where most large fortunes are made, resulting in these clusters being highly concentrated in the most costly MSAs and watering holes of New England, the Mid-Atlantic and Pacific. They quite literally do and buy everything. Very rich, they indulge themselves in what one might expect: fitness clubs, investments, financial advisors, luxury automobiles, business magazines, leisure activities, charities and foreign travel.



#### MATURE WEALTH, A DAY IN THE LIFE

Name of protagonist: "Evelyn"

Wakes up...and has orange juice and a croissant in the garden while reading *The New York Times*. Her husband, Robert, has already left for work to catch the train for his hour and a half commute into the city.

Spends the day...on the phone with her travel agent to make arrangements for their trip to Europe for their wedding anniversary. Before coming home, they'll head down to Tuscany for a few days to stay in a three-bedroom villa and see some old friends.

Talks about weekend plans to...go with the Davidsons to the theater, then go out to a new bistro after. Besides, they haven't seen them in some time, and Robert wants to talk investments with Jack Davidson.

Has a meeting with...the family lawyer to set up a trust fund for Robert and Evelyn's first grandson, Robert Wilson Hunt, IV.

Spends the evening...discussing the latest fund raiser with the other members of her favorite charity's board. Afterward, she and Robert meet some friends in the dining area for some wine and brié, followed by dinner at the club.

Goes to bed at... 11:00 p.m. in her antique, gilded bed with silk sheets and down pillows, while her husband stays up checking their portfolio and trading foreign currencies online.

#### MATURE WEALTH (Group 15M)

National %	Index	Group %	National %	Index
<b>Length of Residence</b>				
2.3	35	<2 Years	7.2	12.7
7.6	39	2-5 Years	20.6	30.2
10.5	39	6-14 Years	36.6	32.0
21.5	46	15+ Years	35.6	25.0
21.5	100			
15.4	230			
10.7	152	<b>Market Value of Home</b>		
10.5	89	<\$50,000	2.7	10.3
57.1		\$50,000-\$99,999	5.7	19.1
		\$100,000-\$124,999	2.7	8.8
		\$125,000-\$149,999	2.9	8.0
		\$150,000-\$199,999	7.4	12.9
10.1	3	\$200,000-\$299,999	10.1	15.9
4.7	2	\$300,000-\$499,999	25.1	14.7
8.8	2	\$500,000+	44.5	10.3
10.8	3			
11.2	4	<b>Dwelling Unit Size</b>		
24.2	6	Single Family Dwelling	93.0	86.0
13.9	37	Multiple Family Dwelling	7.0	14.0
6.3	120			
4.7	997	<b>Occupation</b>		
5.1	726	Professional/Technical	50.2	30.4
		Administration/Management	9.7	6.8
		Sales/Service	1.7	1.7
65.9	151	Clerical/White Collar	10.8	16.7
6.5	2	Craftsman/Blue Collar	6.8	18.7
7.0	0	Student	0.4	0.8
11.1	0	Housewife	2.8	6.0
10.6	0	Retired	10.4	12.1
7.5	0	Other	2.2	3.8
		Self Employed	5.0	3.1
44.0	47	<b>Education</b>		
56.0	142	Completed High School	30.8	53.1
		Completed College	36.1	33.1
		Completed Graduate School	32.9	13.2
		Attended Vocational/Technical	0.2	0.6
9.4	0			
6.8	0	<b>Ethnicity</b>		
5.5	0	Caucasian	85.8	74.3
5.2	0	African American	2.4	10.3
8.6	0	Hispanic	4.6	10.7
10.0	0	Asian	5.7	3.6
20.6	0	Other	1.4	1.1
15.0	0			
9.4	0	<b>Household Size</b>		
3.6	1070	One Person Household	14.3	24.7
4.1	1502	Two Person Household	36.7	26.8
		Three Person Household	21.4	21.3
23.2	37	Four Person Household	15.9	13.0
76.8	119	Five+ Person Household	11.8	12.1
8.3	46	<b>Mail Responsive</b>		
9.3	74	Mail Order Responsive	90.6	76.8
33.4	137	Mail Order Buyer	90.5	76.6
33.2	90	Mail Order Donor	6.5	2.8
8.3	70	<b>Buying Channel Preference - Decile</b>		
3.6	64	Top Internet Decile	23.3	8.9
3.4	59	Top Mail Decile	28.8	11.9
		Top Phone Decile	46.8	12.0

#### WHEN THEY GREW UP...

- Neutron bomb is developed
- Groucho Marx dies
- Roots miniseries draws audience of 130 million
- Dick Williams helps lead the Oakland A's to World Series

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AC-0752-10-1010

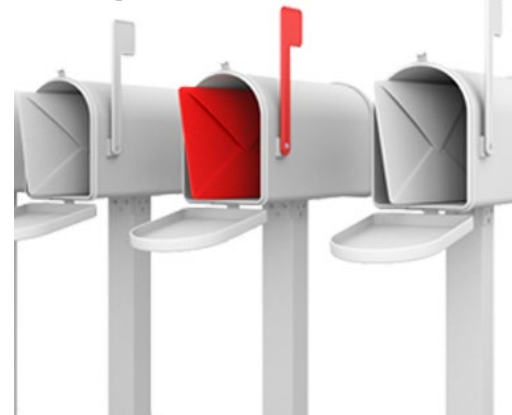
# THE Repeat Stage

*Find More Like Your Best*

**Marketing Efforts:** Determine ROI...

- Purchase qualified list
- Direct Mail, Facebook Advertising, Google Ads
- Frequency!

**USE CO-OP!!!**



# Create Audiences

**You are targeting men and women, ages 28 - 65+ who live in 1 location, and have 25 interests.**

**Location - Living In:**  
United States: Worcester (+30 mi) Massachusetts

**Age:**  
28 - 65+

**Exclude:**  
Home Types: Apartment and Home Ownership: Renters

**People Who Match:**  
**Interests:** Outdoor fireplace, Home Decoration & Design, Interior design, Outdoor Living, Remodeling My Home, Home Décor Products, Interior Design Ideas, Home Decore, Fireplace insert, Home Renovations, Renovation, Major appliance, Gas stove, Home Improvements, Home repair, Home Appliances, Fireplace, Fireplace mantel, Remodeling My House, Home improvement, Wood-burning stove, Pellet fuel, Hearth, Home equity or Pellet stove, Behaviors: Home renovation or Home improvement and Home Ownership: Homeowners

[Hide full summary](#)

**This promotion will run for 12 days.**

**Your total budget for this promotion is \$75.00 USD.**

Your Experiences  
Your Questions



# Visit Our Booth Outside Expo Hall



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**United Buyers**  
GROUP 

  
**ASK US ABOUT**  
**WELCOME MAT**  
ENGAGE AND CONVERT MORE LEADS  
**E-COMMERCE HYBRID**  
SELL AND/OR QUOTE YOUR PRODUCTS ONLINE  
**SILENT AUCTION**  
CLEAR INVENTORY FOR MORE PROFIT  
**GALLERY PRO**  
EASY TO USE FOR TECHS AND CUSTOMERS

  
**SOCIAL MEDIA**  
**FREE MONTH\***  
     
FACEBOOK INSTAGRAM TWITTER GOOGLE  
\* REQUIRES TWELVE MONTH COMMITMENT

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