

Contractor Education Series

Lead Management

Developing a Closed Loop System to
Optimize Marketing Spend and
Maximize Lead Generation



Hello! We are Keokee Contractor Marketing.

Design and marketing agency based in Sandpoint, Idaho

Dedicated team to support branding, web design, and marketing services for remodelers and home builders

www.keokee.com

www.keokeecontractormarketing.com



DRIVE MORE TRAFFIC TO YOUR WEBSITE
We'll help you get more traffic to your website through a variety of digital marketing strategies including SEO, social media, and paid advertising.

CONVERT MORE VISITORS TO LEADS
We'll help you convert more visitors into leads through a variety of digital marketing strategies including lead generation, email marketing, and CRM integration.

GROW YOUR BUSINESS, INCREASE PROFITS
We'll help you grow your business and increase profits through a variety of digital marketing strategies including content marketing, social media, and paid advertising.

what we do.

Is your website working for you?
We'll help you get more traffic to your website through a variety of digital marketing strategies including SEO, social media, and paid advertising. We'll also help you convert more visitors into leads through a variety of digital marketing strategies including lead generation, email marketing, and CRM integration.

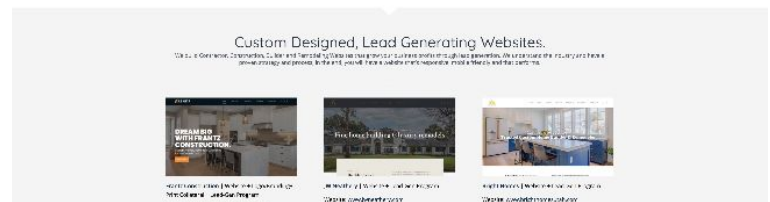
Curious? Contact us for a free initial consultation.



A Proven Marketing System Specifically Created for Contractors, Builders and Remodelers



Keokee Contractor Marketing is a leading digital marketing agency for contractors, builders and remodelers. We'll help you get more traffic to your website through a variety of digital marketing strategies including SEO, social media, and paid advertising. We'll also help you convert more visitors into leads through a variety of digital marketing strategies including lead generation, email marketing, and CRM integration.



Closed Loop System

What is one? **an automatic control system in which an operation, process, or mechanism is regulated by feedback.**
<https://www.merriam-webster.com/>

Why do we use one?

- ✓ Enables system integrity. Apples to Apples
- ✓ It's repeatable
- ✓ Enables accountability...show me your math
- ✓ Measurable...how do we know if we're winning or losing?
- ✓ Because you have limited resources



The Lead Cycle

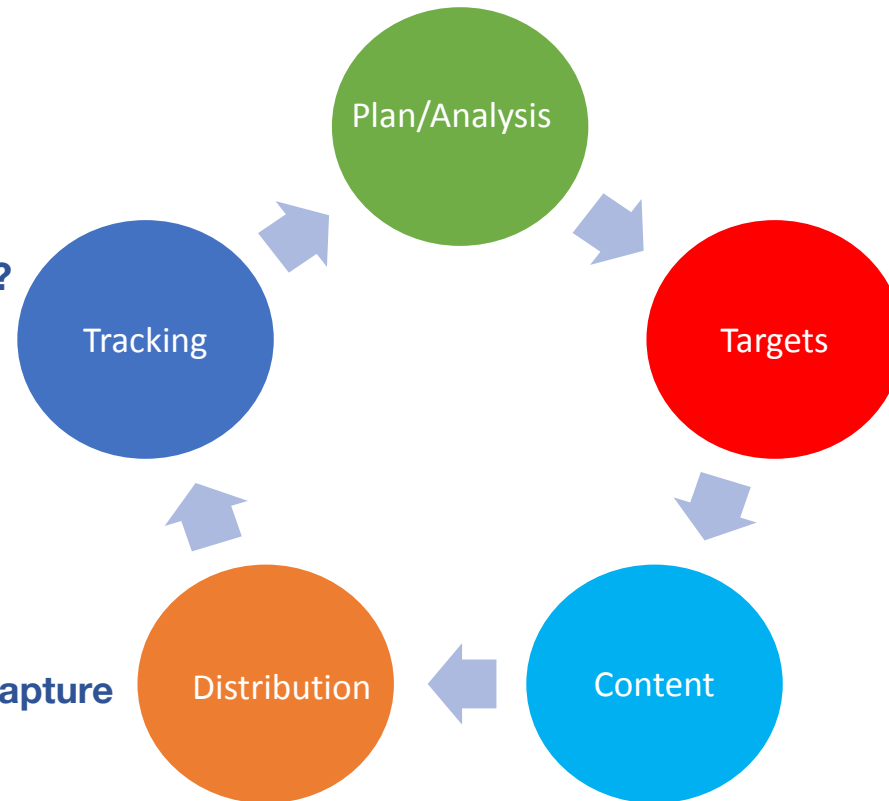
Planning/Analysis

- Create a model that identifies the leads needed to meet your financial goals
- Analyze results and make adjustments

Evaluate and Repeat

Tracking

- Are we capturing the right leads?
- Are we capturing the right amount?



Targets

- What type of leads are needed to meet your plan?

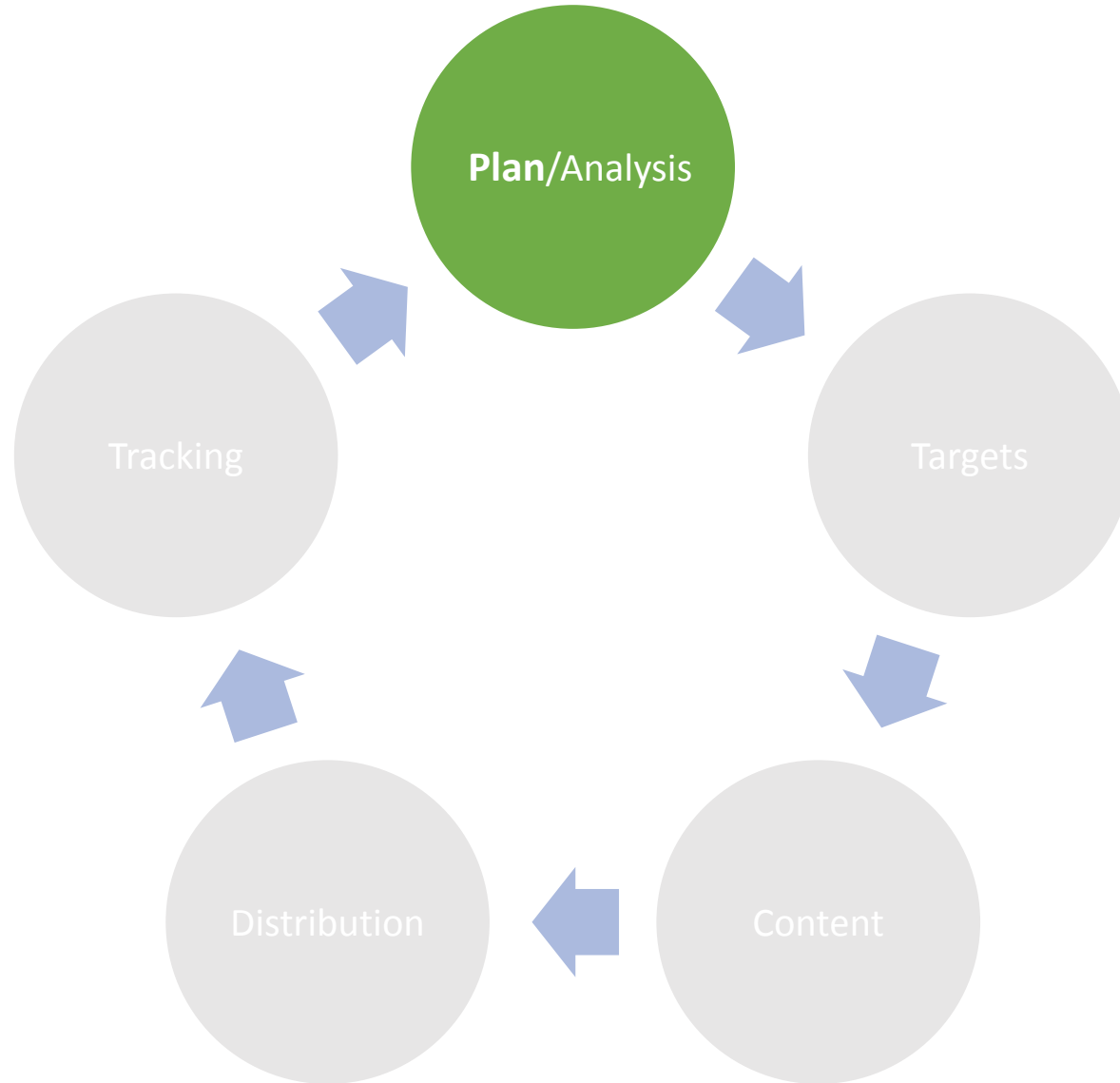
Distribution

- Where are we casting our net to capture our leads?

Content

- What digital assets do we need to accomplish our plan?

Lead Process



Plan & Analysis

- ❑ Create a Master Financial Plan identifying financial targets
- ❑ Use a Spreadsheet, will require some basic skills to use formulas and calculations
- ❑ Use your Profit and Loss Statement to create your top line forecast and actuals.
- ❑ Master Plan starts with Total Revenue cascading to number of leads needed
- ❑ Create supporting tracking tools that will roll up information into the next planning cycle
- ❑ Planning and Analysis is the goal setting and evaluation step



Plan & Analysis Modeling

Target Goals	Starting Numbers	Current Run Rate	Current Percent	Next Goal	Next Goal Percent	Target	Target Percent
Revenue	\$ 3,500,489	\$ 2,096,566	100.00%	\$ -		\$ 2,758,007	100.00%
Cost of Goods	\$ 3,186,972	\$ 1,620,383	77.29%	\$ -		\$ 1,983,007	71.90%
Gross Profit	\$ 313,517	\$ 476,183	22.71%	\$ -		\$ 775,000	28.10%
Overhead	\$ 286,555	\$ 231,943	11.06%			\$ 275,000	9.97%
Net Profit	\$ 26,962	\$ 244,240	11.65%			\$ 500,000	18.13%
Total Number of Jobs	74.00	41.00	0.00%	\$ -		\$ 21.17	
Average Job Size	\$ 47,303.91	\$ 51,135.76	2.44%	\$ 54,655	115.54%	\$ 227,500	

Next Goal Job Mix	Job Size	Target GPM	% of Revenue	Target \$	Jobs Per Year	Jobs per Month	Goal Close Rate	Leads Needed
Residential Remodel	\$ 85,000	26.00%		\$ -				
New Home Const.				\$ -				
Other 1	\$ 30,000	32.00%		\$ -				
Other 2				\$ -				
				\$ -				
				\$ -				
				\$ -				

Target Job Mix	Job Size	Target GPM	% of Revenue	Target \$	Jobs Per Year	Jobs per Month	Close Rate	Leads Needed
Residential Remodel	\$ 125,000.00	30.00%	60.00%	\$ 1,654,804	13.24	1.10	20%	5.52
New Home Const.	\$ 800,000.00	22.00%	30.00%	\$ 827,402	1.03	0.09	10%	0.86
Other 1	\$ 40,000.00	35.00%	10.00%	\$ 275,801	6.90	0.57	30%	1.92
Other 2				\$ -				
				\$ -				
				\$ -				
				\$ -				



Plan & Analysis Modeling

Let's break this bad boy down into digestible bites

	Plan	
Revenue	\$	2,500,000.00
Job Mix		
Additions	\$	1,020,000.00 40.80%
Kitchen Remodel	\$	315,000.00 12.60%
Bathroom Remodel	\$	156,000.00 6.24%
ADU	\$	1,012,000.00 40.48%
	\$	2,503,000.00 100%
Gross Margin Percentage		
Additions		28.00%
Kitchen Remodel		22.00%
Bathroom Remodel		20.00%
ADU		30.00%
GM total		25.00%
Gross Margin Dollars		
Additions	\$	285,600.00
Kitchen Remodel	\$	69,300.00
Bathroom Remodel	\$	31,200.00
ADU	\$	303,600.00
GM total	\$	689,700.00
Overhead	\$	192,000.00
NOP	\$	497,700.00
NOP %		19.91%
Average Job Value		
Additions	\$	85,000.00
Kitchen Remodel	\$	45,000.00
Bathroom Remodel	\$	26,000.00
ADU	\$	92,000.00
Total Average Job Value	\$	62,000.00
Number of Jobs		
Additions		12
Kitchen Remodel		7
Bathroom Remodel		6
ADU		11
Total Jobs		36
Gross Margin Dollars by Job		
Additions	\$	285,600.00
Kitchen Remodel	\$	69,300.00
Bathroom Remodel	\$	31,200.00
ADU	\$	303,600.00
Total Gross Margin Dollars	\$	689,700.00
Targeted Leads Per Year		183
Additions		80
Kitchen Remodel		28
Bathroom Remodel		20
ADU		55
Close Rate		22.50%
Additions		15.00%
Kitchen Remodel		25.00%
Bathroom Remodel		30.00%
ADU		20.00%
Conversions - Actual		36
Additions		12
Kitchen Remodel		7
Bathroom Remodel		6
ADU		11
Lead Value GMD	\$	16,625.00
Additions	\$	23,800.00
Kitchen Remodel	\$	9,900.00
Bathroom Remodel	\$	5,200.00
ADU	\$	27,600.00
Leads from Digital Direct		91.50
Digital Conversions		20.6

50%

50%



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Plan & Analysis Modeling

- Using this model, let's identify the segments that bring out the highest value and become the high margin segment targets
- Additions and ADU are the plan opportunities.

	Plan	
Revenue	\$ 2,500,000.00	
Job Mix		
Additions	\$ 1,020,000.00	40.80%
Kitchen Remodel	\$ 315,000.00	12.60%
Bathroom Remodel	\$ 156,000.00	6.24%
ADU	\$ 1,012,000.00	40.48%
	\$ 2,503,000.00	100%
Gross Margin Percentage		
Additions	28.00%	
Kitchen Remodel	22.00%	
Bathroom Remodel	20.00%	
ADU	30.00%	
GM total	25.00%	
Gross Margin Dollars		
Additions	\$ 285,600.00	
Kitchen Remodel	\$ 69,300.00	
Bathroom Remodel	\$ 31,200.00	
ADU	\$ 303,600.00	
GM total	\$ 689,700.00	
Overhead	\$ 192,000.00	
NOP	\$ 497,700.00	
NOP %	19.91%	



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Plan & Analysis Modeling

- As we cascade the model, we develop the Job value and number of jobs we need to meet the plan.
- We need 12 Additions and 11 ADU jobs at the Average Job value of \$85K and \$92K respectively to achieve plan.
- To show integrity in our math we reconcile back to the GMD targets.

Average Job Value		
Additions	\$	85,000.00
Kitchen Remodel	\$	45,000.00
Bathroom Remodel	\$	26,000.00
ADU	\$	92,000.00
Total Average Job Value	\$	62,000.00
Number of Jobs		
Additions		12
Kitchen Remodel		7
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Gross Margin Dollars by Job		
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ADU	\$	303,600.00
Total Gross Margin Dollars	\$	689,700.00



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Plan & Analysis Modeling

- We apply a conversion rate to each segment and calculate the leads needed.
- The conversions needed match the jobs needed.
- The plan calls for 50% of the total jobs to come from digital marketing

Targeted Leads Per Year		183	
Additions		80	
Kitchen Remodel		28	
Bathroom Remodel		20	
ADU		55	
Close Rate		22.50%	
Additions		15.00%	
Kitchen Remodel		25.00%	
Bathroom Remodel		30.00%	
ADU		20.00%	
Conversions - Actual		36	
Additions		12	
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ADU		11	
Lead Value GMD	\$	16,625.00	
Additions	\$	23,800.00	
Kitchen Remodel	\$	9,900.00	
Bathroom Remodel	\$	5,200.00	
ADU	\$	27,600.00	
Leads from Digital Direct		91.50	50%
Sales Conversions from Digital		18.0	50%

Plan & Analysis Modeling

Key Performance Indicators (KPIs)

By Segment

- ★ Job Value
- ★ Gross Margin
- ★ Leads
- ★ Sales

Modeling Recap

- We identified the high margin segments
- We identified the leads needed by segment to achieve the plan
- We identified the sales needed to achieve the plan
- We now have data to analyze our performance compared to plan (better or less than plan analysis)
- We can use this information to prioritize our marketing focus.
- Based on this plan:
 - We will focus the majority of our marketing spend and effort on Additions and ADU
 - Kitchen and Bathroom Remodels goals are set low enough where we can be opportunistic in sales and minimize marketing

Planning - Lead Tracking Set Up

To support our plan we're going to use two files to help with future analysis

1. Contact Tracking
2. Channel Tracking

Created Date	Lead Name	Lead Score (1 - 5)	Status	Job Type	Sources	Quote	Revenue
Jan 29	Sfdish, Kumar		Sold	Kitchen Remodel	Referral- from Past Client		
Jan 29	Gonzales Matt		Not Sold	ADU	Contact Form		
Jan 27	Stasaitis Marc		Sold	Addition	Contact Form		
Jan 26	Cleveland, Matt & Cindy		Not Sold	ADU	Google		
Jan 25	Sivalingam, Danielle		Sold	Bathroom Remodel	Google		
Jan 22	Smith David		Sold	Addition	Referral- from Past Client		
Jan 22	Crosby Jon		Sold	Master Suite	Contact Form		
Jan 19	Wiesner, Judy & Fred		Sold	Addition	Google		
Jan 18	Alocozy, Mary		Sold	Kitchen Remodel	Houzz		
Jan 18	McGregor, Brian and Sheri		Not Sold	Addition	Signage		
Jan 18	Romero Edmond		No Opportunity	Garage Conversion	Contact Form		
Jan 15	Lundy Shane		Open	Kitchen Remodel	Contact Form		
Jan 13	Shisher		Open	Addition	Referral-Realtor		
Jan 9	Hardy Tevi		Open	Bathroom Remodel	Contact Form		
Jan 7	Matthews, Mike		Sold	Bathroom Remodel	Google, YELP		
Jan 5	Gibbs Jeff and Lisa		Sold	Addition	Contact Form		
Jan 2	Christie, Jackie & Doug		Open	ADU	Referral-Realtor		

Source	Percentage	Lead Count	Close Count	Conversion Rate	Average Job Value	Avg. Gross Margin Dollars	Total GMD
Digital Direct							
Calls	0.00%	0	0				
Emails	0.00%	0	0				
Contacts	6.85%	110	44	13.60%			
Digital 3rd Party							
Angles List	20.87%	335	134	41.41%			
BBB	1.06%	17	6.8	2.10%			
5 Star Rated	0.31%	5	2	0.62%			
Home Advisor	0.62%	10	4	1.24%			
Next Door	0.62%	10	4	1.24%			
Referrals	17.88%	287	114.8	35.48%			
Signage	2.18%	35	14	4.33%			
Networking	0.00%	0	0				
Events	0.00%	0	0				
Print Advertising	0.00%	0	0				
Direct Mail	0.00%	0	0				
Geo-Farming	0.00%	0	0				
Sponsorships	0.00%	0	0				
Radio	0.00%	0	0				
Billboards	0.00%	0	0				
Unknown	49.60%	796	0				
	100.00%	1605	323.6				

Lead Tracking - Contacts (Weekly)

- Use the best method you can
- Record every contact and keep track of the outcome
- Associate each sale to a channel (source)
- We added 3 plan KPIs to track

Created Date	Lead Name	Location	Status	Job Type	Sources	Quote	Revenue
Jan 29	Sfdish, Kumar		Sold	Kitchen Remodel	Referral- from Past Client		
Jan 29	Gonzales Matt		Not Sold	ADU	Contact Form		
Jan 27	Stasaitis Marc		Sold	Addition	Contact Form		
Jan 26	Cleveland, Matt & Cindy		Not Sold	ADU	Google		
Jan 25	Sivalingam, Danielle		Sold	Bathroom Remodel	Google		
Jan 22	Smith David		Sold	Addition	Referral- from Past Client		
Jan 22	Crosby Jon		Sold	Master Suite	Contact Form		
Jan 19	Wiesner, Judy & Fred		Sold	Addition	Google		
Jan 18	Alocozy, Mary		Sold	Kitchen Remodel	Houzz		
Jan 18	McGregor, Brian and Sheri		Not Sold	Addition	Signage		
Jan 18	Romero Edmond		No Opportunity	Garage Conversion	Contact Form		
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Jan 13	Shisher		Open	Addition	Referral-Realtor		
Jan 9	Hardy Tevi		Open	Bathroom Remodel	Contact Form		
Jan 7	Matthews, Mike		Sold	Bathroom Remodel	Google, YELP		
Jan 5	Gibbs Jeff and Lisa		Sold	Addition	Contact Form		
Jan 2	Christie, Jackie & Doug		Open	ADU	Referral-Realtor		



Lead Tracking – Channel Analysis (Monthly)

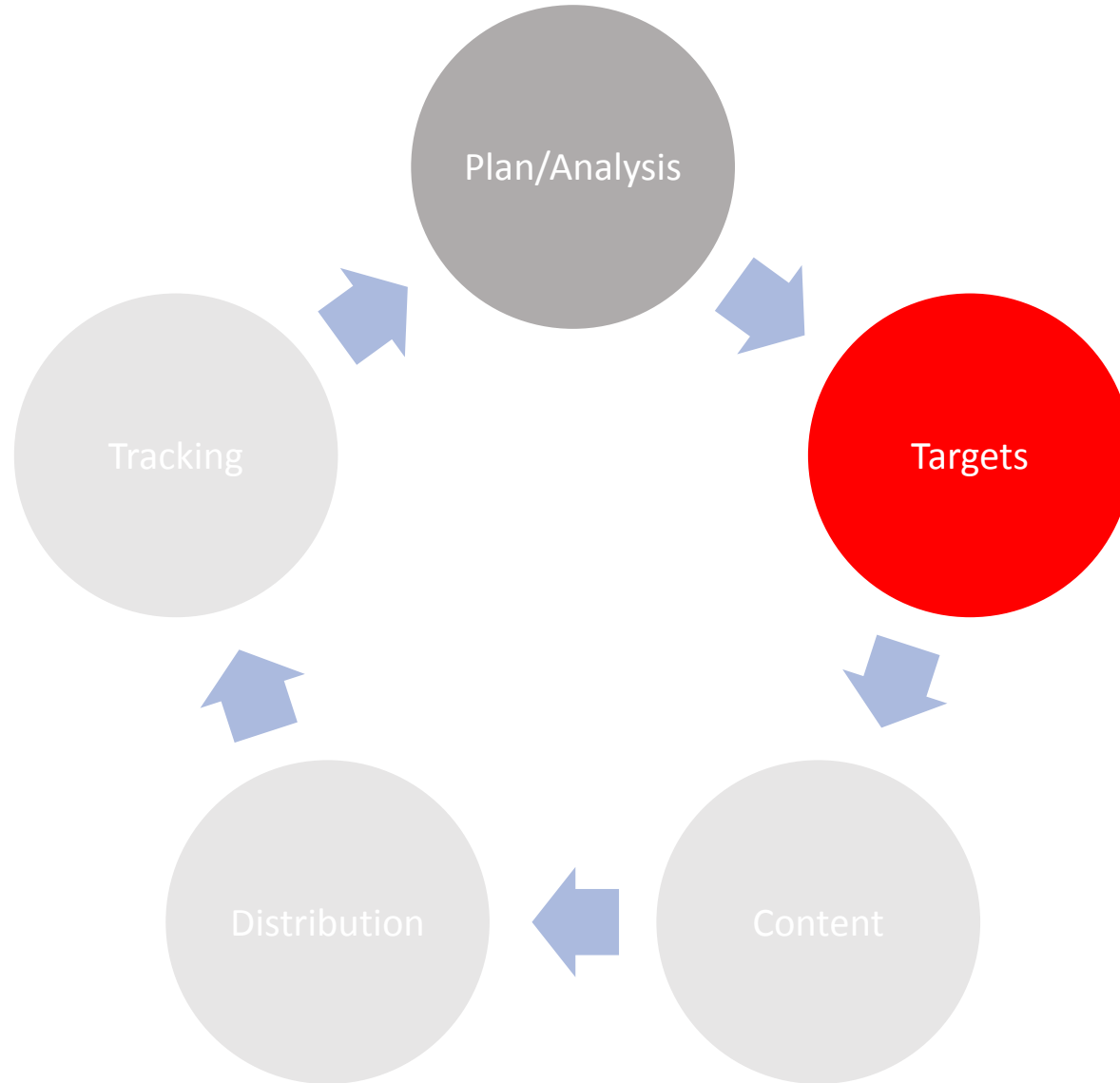
Channel Analysis

- Start where you are
- This is an example of our starting point with a client
- Avoid the large amount of Unknown
- Let's add some plan KPIs to our tracking

Source	Percentage	Lead Count	Close Count	Conversion Rate	Average Job Value	Avg. Gross Margin Dollars	Total GMD
Digital Direct							
Calls	0.00%	0	0				
Emails	0.00%	0	0				
Contacts	6.85%	110	44	13.60%			
Digital 3rd Party							
Angies List	20.87%	335	134	41.41%			
BBB	1.06%	17	6.8	2.10%			
5 Star Rated	0.31%	5	2	0.62%			
Home Advisor	0.62%	10	4	1.24%			
Next Door	0.62%	10	4	1.24%			
Referrals	17.88%	287	114.8	35.48%			
Signage	2.18%	35	14	4.33%			
Networking	0.00%	0	0				
Events	0.00%	0	0				
Print Advertising	0.00%	0	0				
Direct Mail	0.00%	0	0				
Geo-Farming	0.00%	0	0				
Sponsorships	0.00%	0	0				
Radio	0.00%	0	0				
Billboards	0.00%	0	0				
Unknown	49.60%	796	0				
	100.00%	1605	323.6				

From our KPI Tracking

Lead Process



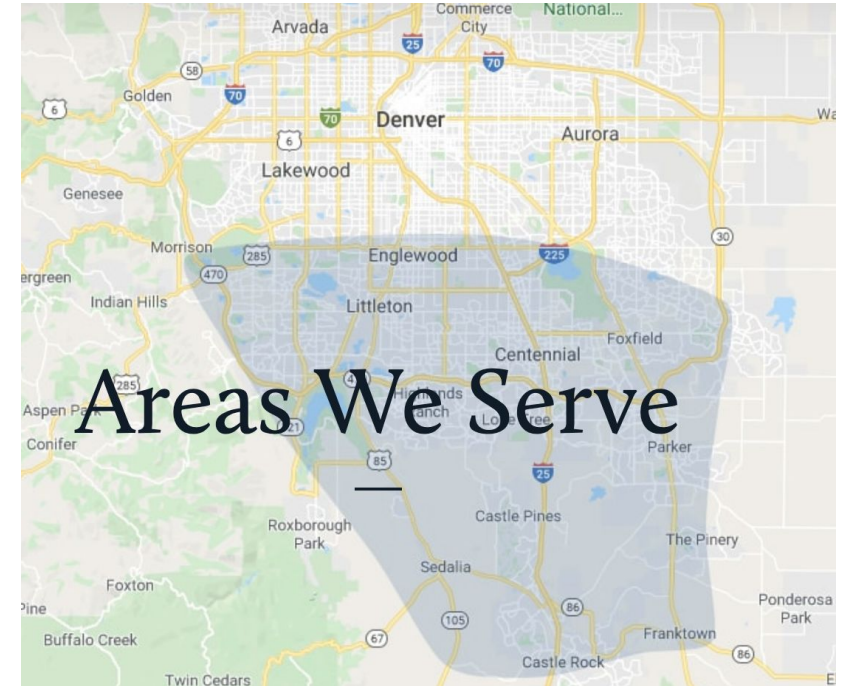
Targets

Ideal Client

- Personal & Professional Profile
- Design Preferences
- Interest & Hobbies

Service Market

- Finding your target market is aligning your service market with your business needs (high margin jobs)
- Define “Areas We Serve”
- Know the competitive landscape





Targets - Market

Denver Market

- Geographically achievable (service range)
- High potential for interest
 - High income
 - High home value
 - Desired location, new developments, schools, historical, etc.

Area/Neighborhoods	Zip Codes	Median HHI
Targets		
Cherry Hills Village	80113	\$250,001
Greenwood Village	80111	\$127,134
Highlands Ranch	80126	\$122,851
Castle Rock	80108	\$122,417
Highlands Ranch	80130	\$121,165
Littleton	80130	\$121,165
Foxfield	80016	\$120,833
Lonetree	80134	\$115,746
Highlands Ranch	80129	\$111,636
Parker	80134	\$110,779
Parker	80138	\$110,779
Franktown	80116	\$110,779
Centennial	80122	\$105,974
Centennial	80112	\$105,974
Centennial	80016	\$105,974
Littleton	80120	\$68,954
Denver	80237	\$63,793
Denver	80222	\$63,793
Denver	80210	\$63,793
Denver	80209	\$63,793
Denver	80223	\$63,793
Aurora	80016	\$62,541
Englewood	80110	\$56,586

Targets - Competitors

Denver Market

❖ Attributes to Identify

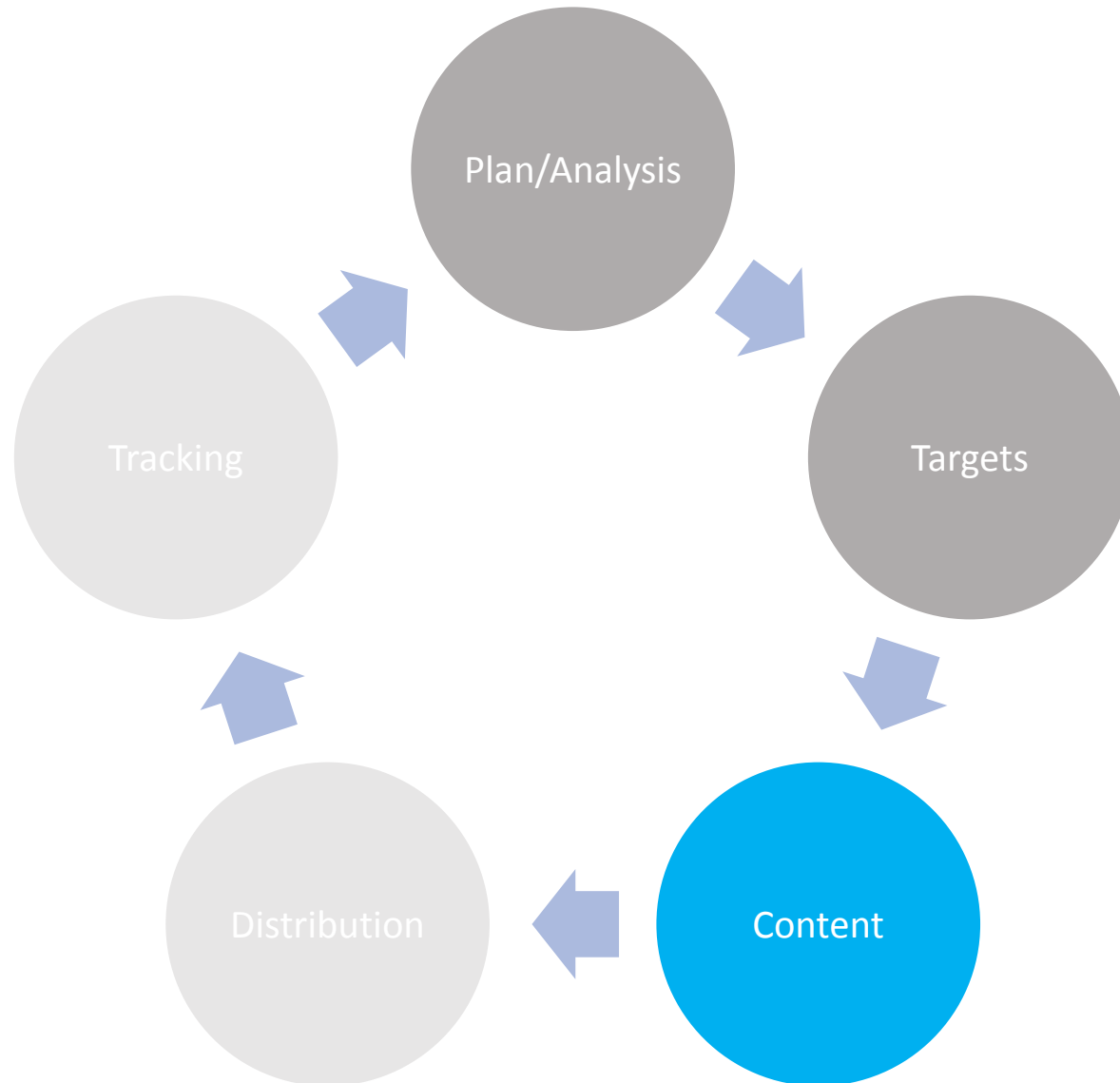
- Markets
- Positioning
- Local Search Profile
- Website Design and Content
- Keywords
- Advertising Strategy

Note on Domain Authority

A reliable indicator of your digital competition is their Domain Authority Score (1-100). This is based on a formula that accounts for content (on and off the website), links and traffic. The score reflects whether Google trusts who you say you are, do what you say you do, and do it where you say do it!

Site	Domain Authority	Location
vistaremodeling.com	47	Highland Ranch
meltondesignbuild.com	31	Louisville
classichomeworks.com	28	Denver
elkstonebasements.com	26	Douglas Co.
https://www.wedgewoodcabinetry.com/	26	Cherry Hills Village
https://fbcremodel.com/	26	Cherry Hills Village
obrienconstructiondenver.com	22	Highland Ranch
prestigeremodeling.com	22	Castle Rock
hhbldrs.com	21	Denver
affordablebasements.com	21	Denver
https://alton-construction.com/	19	Cherry Hills Village
harderremodeling.com	18	Highland Ranch
summit-renovations.com	18	Denver
blueskyremodelingdenver.com	17	Denver
grcbuilders.com	17	Highland Ranch
deyoungbrothersconstruction.com	16	Douglas Co.
https://hallmarkcustomhomes.com/	12	Douglas Co.
https://remodelingdenver.co/	12	Denver

Lead Process



Content

It acts as digital currency providing the holder with the ability to exchange influence and acquire targeted leads.

- ★ Local Search Optimization
- ★ Website
 - Project Portfolio
 - Landing Pages
 - Meta Data
- ★ Keywords
- ★ Newsletters
- ★ Video - Testimonials
- ★ Social Media
- ★ Blogs
- ★ Whitepapers
- ★ Advertising



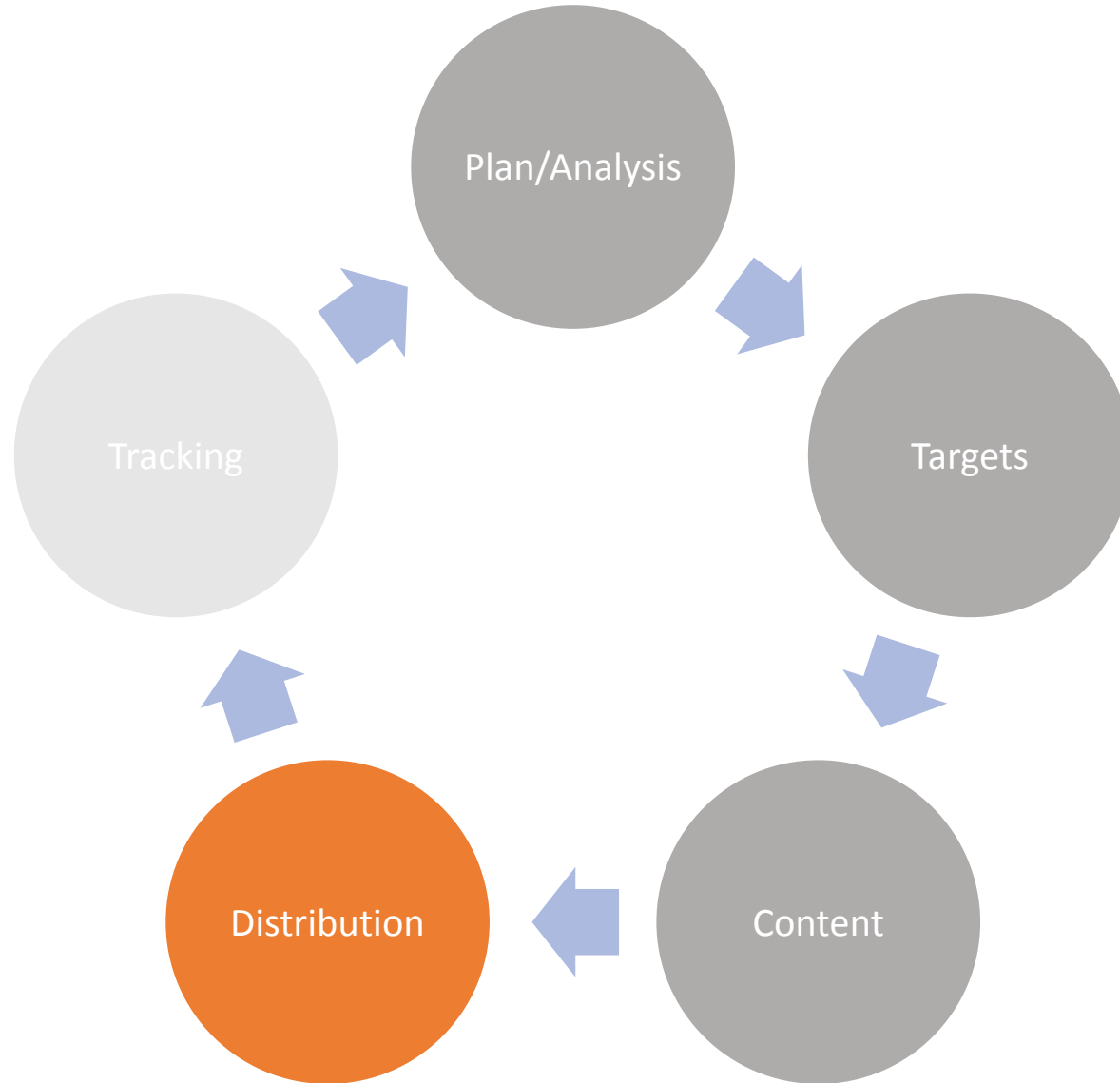
- ❑ Content serves multiple purposes – Attract and Convert
 - ❑ **Engagement.** Provides prospects with information as they go through their buying journey, navigating the sales funnel , and ultimately working as a conversion tool.
 - ❑ **Findability.** Provides Google Search with the necessary information they require to rank your website (Trust+Authority+Relevance) improving organic search results.

Content Cost Model

- Baseline – One Time Expense
- Variable – Monthly Expense.
- Typical Engagement
 - \$25K-\$36K/year First Year
 - \$15K-\$24K/ea. Year after
- The best approach is doing a cohesive, holistic program.
- Ala Carte will have some degree of lost effectiveness
- It all depends on what assets your currently have and how they align with your business strategy

Costs		Low	High	Average	Effectiveness to Goal
Baseline	Branding	\$ 3,000.00	\$ 6,000.00	\$ 4,500.00	
	Website	\$ 7,000.00	\$ 15,000.00	\$ 11,000.00	
	Digital Content	\$ 1,500.00	\$ 4,000.00	\$ 2,750.00	
Variable	Google Ads	\$ 500.00	\$ 2,000.00	\$ 1,250.00	
	Local Optimization	\$ 800.00	\$ 2,000.00	\$ 1,400.00	
	SEO	\$ 1,200.00	\$ 2,500.00	\$ 1,850.00	
	email	\$ 300.00	\$ 600.00	\$ 450.00	

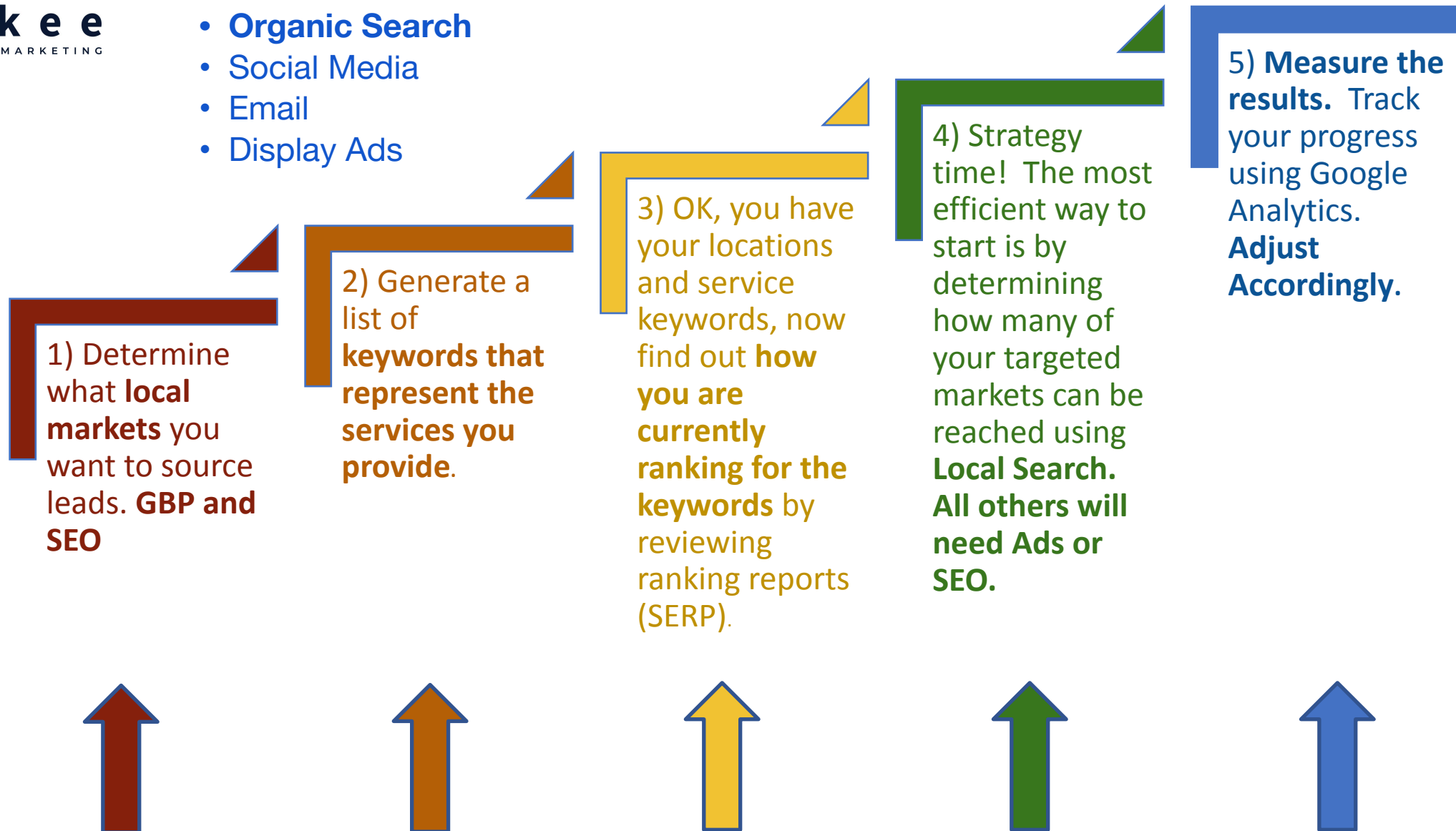
Lead Process



Channels

- Search Ads
- Local Search
- Organic Search
- Social Media
- Email
- Display Ads

Channels (In 5 Steps)





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Search Marketing Model

	Keyword Volume	Market Share	Click Thru Rate	Site Visits	Lead Conversion	Sales Conversions	Annualized
Ads	1000	25%	5%	12.5	3.125	0.9375	
SEO Early	50	25%	50%	6.25	1.5625	0.46875	
Local	250	33%	40%	33	8.25	2.475	
						3.88125	46.575

	Keyword Volume	Market Share	Click Thru Rate	Site Visits	Lead Conversion	Sales Conversions	Annualized	Increase
Ads	1000	25%	5%	12.5	3.125	0.9375		
SEO Later	500	25%	50%	62.5	15.625	4.6875		
Local	1000	33%	40%	132	33	9.9		
						15.525	186.3	300%

Channels (Step #4 Explained)

6-9 months

Priority Location 1 – Local Search

Priority Location 2 - Google Ads

Priority Location 3 - Local Search

Priority Location 4 - Google Ads

Priority Location 5 - Local Search

Priority Location 6 - Google Ads

After 9 Months

Priority Location 1 – Local Search

Priority Location 2 - Google Ads/Organic

Priority Location 3 - Local Search

Priority Location 4 - Organic

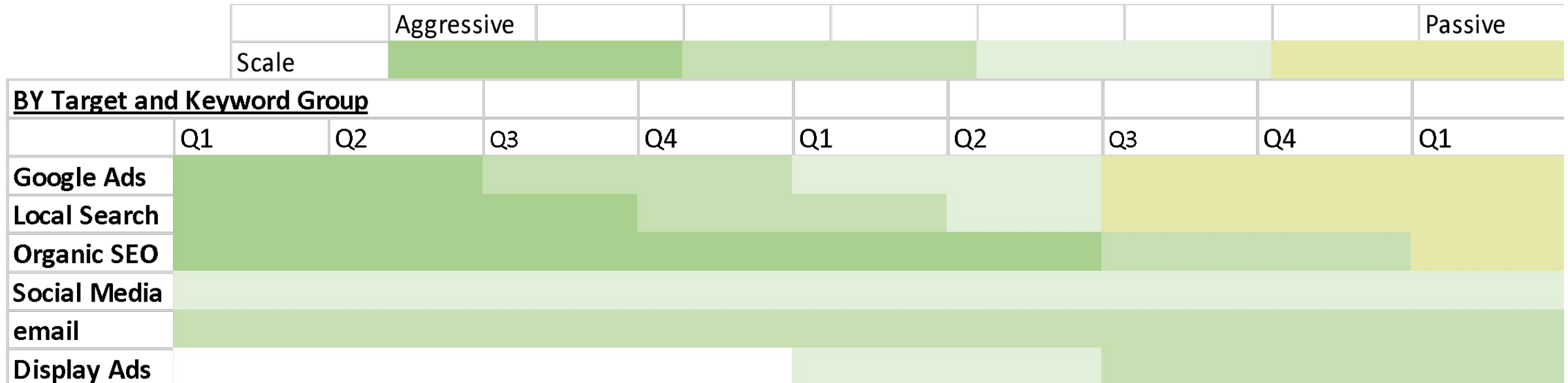
Priority Location 5 - Local Search

Priority Location 6 - Organic

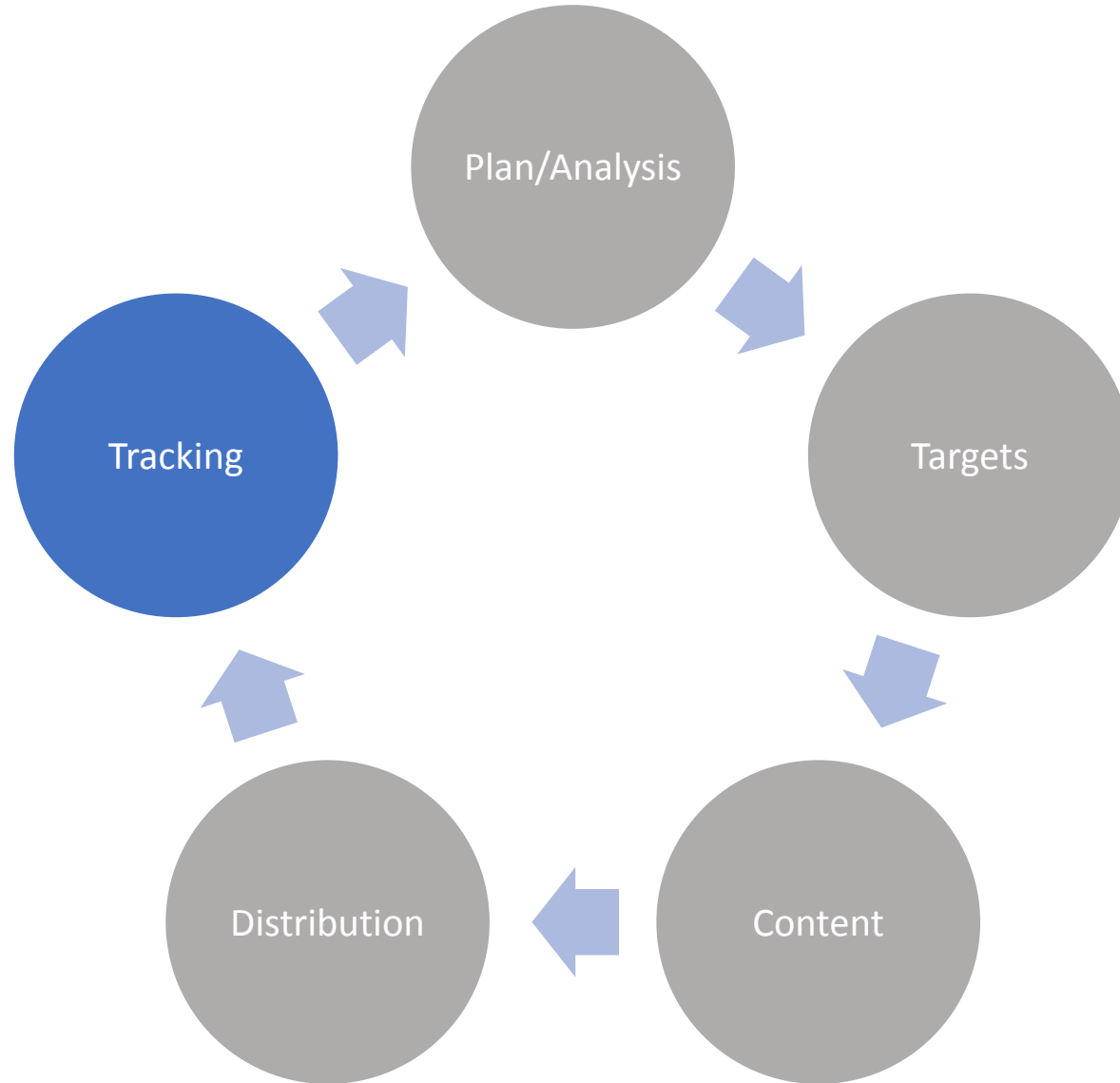
Distribution/Channels

Channels

- Search Ads
- Local Search
- Organic Search
- Social Media
- Email
- Display Ads



Lead Process



Tracking - Contacts

- From our planning set up we now have 3 additional data points to use for analysis
- You can sort the columns to provide additional viewing options
- Leverage CRM to help

Created Date	Lead Name	Location	Sold Or Not Sold	Job Type	Sources	Quote	Revenue
Jan 27	Stasaitis Marc	Eldorado Hills	Sold	Addition	Contact Form	\$86,250	\$86,250
Jan 5	Gibbs Jeff and Lisa	Cameron Park	Sold	Addition	Contact Form	\$87,000	\$87,000
Jan 19	Wiesner, Judy & Fred	Placerville	Sold	Addition	Google	\$150,000	\$150,000
Jan 22	Smith David	Pollock Pines	Sold	Addition	Referral- from Past Client	\$125,000	\$125,000
Jan 13	Shisher	Folsom	Open	Addition	Referral-Realtor	\$0	\$0
Jan 18	McGregor, Brian and Sheri	Eldorado Hills	Not Sold	Addition	Signage	\$119,000	\$0
Jan 29	Gonzales Matt	Coloma	Not Sold	ADU	Houzz	\$95,000	\$0
Jan 26	Cleveland, Matt & Cindy	Eldorado Hills	Sold	ADU	Contact Form	\$200,000	\$200,000
Jan 2	Christie, Jackie & Doug	Placerville	Open	ADU	Referral-Realtor	\$0	\$0
Jan 9	Hardy Tevi	Cameron Park	Open	Bathroom Remodel	Contact Form	\$0	\$0
Jan 25	Sivalingam, Danielle	Camino	Sold	Bathroom Remodel	Google	\$34,895	\$34,895
Jan 7	Matthews, Mike	Citrus Heights	Sold	Bathroom Remodel	Google, YELP	\$27,000	\$27,000
Jan 18	Romero Edmond	Citrus Heights	No Opportunity	Garage Conversion	Contact Form	\$0	\$0
Jan 15	Lundy Shane	Cameron Park	Open	Kitchen Remodel	Contact Form	\$0	\$0
Jan 18	Alocozy, Mary	Rancho Cordova	Sold	Kitchen Remodel	Houzz	\$37,600	\$37,600
Jan 29	Sfdish, Kumar	Diamond Springs	Sold	Kitchen Remodel	Referral- from Past Client	\$45,000	\$45,000
Jan 22	Crosby Jon	Folsom	Sold	Master Suite	Contact Form	\$56,400	\$56,400



Tracking - Channels

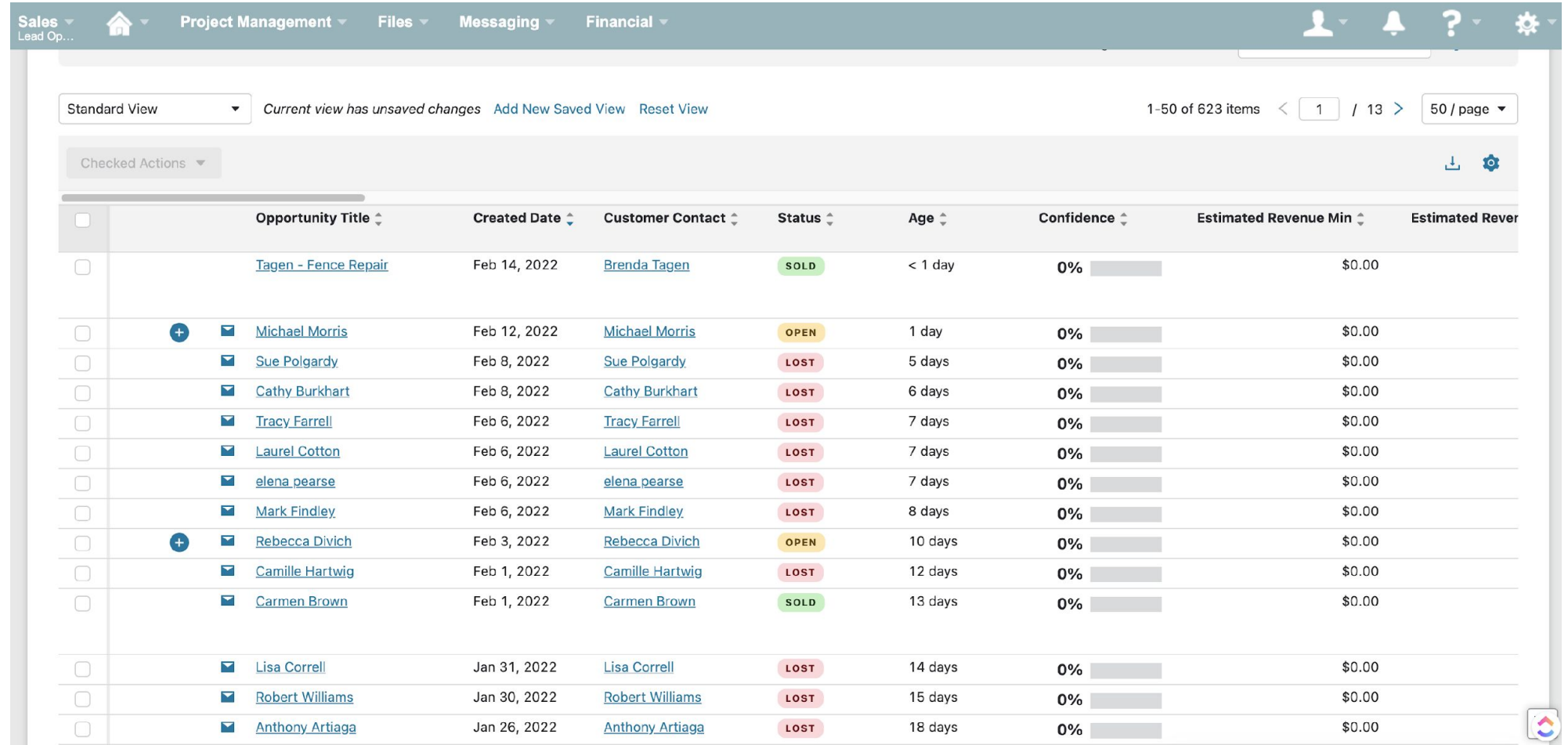
- Apply KPI values to each channel
- This will help compare the results to your plan, analyze sales processes, and choosing the right channels
- You are collecting actionable information

Source	Percentage	Lead Count	Close Count	Conversion Rate	Average Job Value	Avg. Gross Margin Dollars	Total GMD
Digital Direct							
Calls	23.44%	49	7	14.29%	\$ 35,000.00	\$ 9,100.00	\$ 63,700.00
Emails	0.00%	0	0	0%	\$ -		
Contacts	31.10%	65	7	10.77%	\$ 50,100.00	\$ 13,026.00	\$ 91,182.00
Digital 3rd Party							
Angies List	11.96%	25	4	16.00%	\$ 17,000.00	\$ 4,420.00	\$ 17,680.00
BBB	8.13%	17	3	17.65%	\$ 25,000.00	\$ 6,500.00	\$ 19,500.00
5 Star Rated	2.39%	5	1	20.00%	\$ 33,000.00	\$ 8,580.00	\$ 8,580.00
Home Advisor	4.78%	10	1	10.00%	\$ 25,000.00	\$ 6,500.00	\$ 6,500.00
Next Door	4.78%	10	1	10.00%	\$ 45,000.00	\$ 11,700.00	\$ 11,700.00
Referrals	7.18%	15	4	26.67%	\$ 33,000.00	\$ 8,580.00	\$ 34,320.00
Signage	4.31%	9	3	33.33%	\$ 51,000.00	\$ 13,260.00	\$ 39,780.00
Networking	1.91%	4	1	25.00%	\$ 33,000.00	\$ 8,580.00	\$ 8,580.00
Events	0.00%	0	0				
Print Advertising	0.00%	0	0				
Direct Mail	0.00%	0	0				
Geo-Farming	0.00%	0	0				
Sponsorships	0.00%	0	0				
Radio	0.00%	0	0				
Billboards	0.00%	0	0				
Unknown	0.00%	0	0				
	100.00%	209	32	18%	\$ 34,710.00	\$ 9,024.60	\$ 301,522.00

Actionable Data!

Tracking with CRM

- Custom
 - Views
 - Filters
 - Targets
 - Action(s)
- Automation
 - Contact form submission
 - Reporting



Sales Lead Op... Project Management Files Messaging Financial

Standard View *Current view has unsaved changes* Add New Saved View Reset View 1-50 of 623 items < 1 / 13 > 50 / page

Checked Actions


<input type="checkbox"/>	Opportunity Title	Created Date	Customer Contact	Status	Age	Confidence	Estimated Revenue Min	Estimated Revenue
<input type="checkbox"/>	Tagen - Fence Repair	Feb 14, 2022	Brenda Tagen	SOLD	< 1 day	0%	\$0.00	
<input type="checkbox"/>	+ Michael Morris	Feb 12, 2022	Michael Morris	OPEN	1 day	0%	\$0.00	
<input type="checkbox"/>	Sue Polgardy	Feb 8, 2022	Sue Polgardy	LOST	5 days	0%	\$0.00	
<input type="checkbox"/>	Cathy Burkhardt	Feb 8, 2022	Cathy Burkhardt	LOST	6 days	0%	\$0.00	
<input type="checkbox"/>	Tracy Farrell	Feb 6, 2022	Tracy Farrell	LOST	7 days	0%	\$0.00	
<input type="checkbox"/>	Laurel Cotton	Feb 6, 2022	Laurel Cotton	LOST	7 days	0%	\$0.00	
<input type="checkbox"/>	elena_pearse	Feb 6, 2022	elena_pearse	LOST	7 days	0%	\$0.00	
<input type="checkbox"/>	Mark Findley	Feb 6, 2022	Mark Findley	LOST	8 days	0%	\$0.00	
<input type="checkbox"/>	+ Rebecca Divich	Feb 3, 2022	Rebecca Divich	OPEN	10 days	0%	\$0.00	
<input type="checkbox"/>	Camille Hartwig	Feb 1, 2022	Camille Hartwig	LOST	12 days	0%	\$0.00	
<input type="checkbox"/>	Carmen Brown	Feb 1, 2022	Carmen Brown	SOLD	13 days	0%	\$0.00	
<input type="checkbox"/>	Lisa Correll	Jan 31, 2022	Lisa Correll	LOST	14 days	0%	\$0.00	
<input type="checkbox"/>	Robert Williams	Jan 30, 2022	Robert Williams	LOST	15 days	0%	\$0.00	
<input type="checkbox"/>	Anthony Artiaga	Jan 26, 2022	Anthony Artiaga	LOST	18 days	0%	\$0.00	

Tracking with CRM

- Geo-target Verification Point

Contact Information

[Edit Contact](#) [Remove](#)

 Vincent Bernal
6246 Whirlwind Dr
Colorado Springs, CO 80923
Phone: 7068334874
Email: vincentbernal29@gmail.com


[General](#) [Activities \(5\)](#) [Proposals](#)

Opportunity Title * Last contacted by Chuck Farrington on Dec 23, 2021

Vincent Bernal

Address Copy from Contact

Street Address

6246 Whirlwind Dr 

City **State** **Zip Code**

Colorado Springs CO 80923

Confidence **Projected Sales Date**

Tracking with CRM

▼ Custom Fields (7)

- Right Job Target

Site Visit Date

Follow Up Meeting Date

Agreement Signed

Project Start Date

Project Budget

Describe Your Project *

How Did You Find Us? *

Right

Site Visit Date

Follow Up Meeting Date

Agreement Signed

Project Start Date

Project Budget

Describe Your Project *

How Did You Find Us? *

Wrong

Tracking with CRM

- Use notes to fill in gaps on selling process
- Notate the why
 - Sold
 - Lost
 - No Opportunity

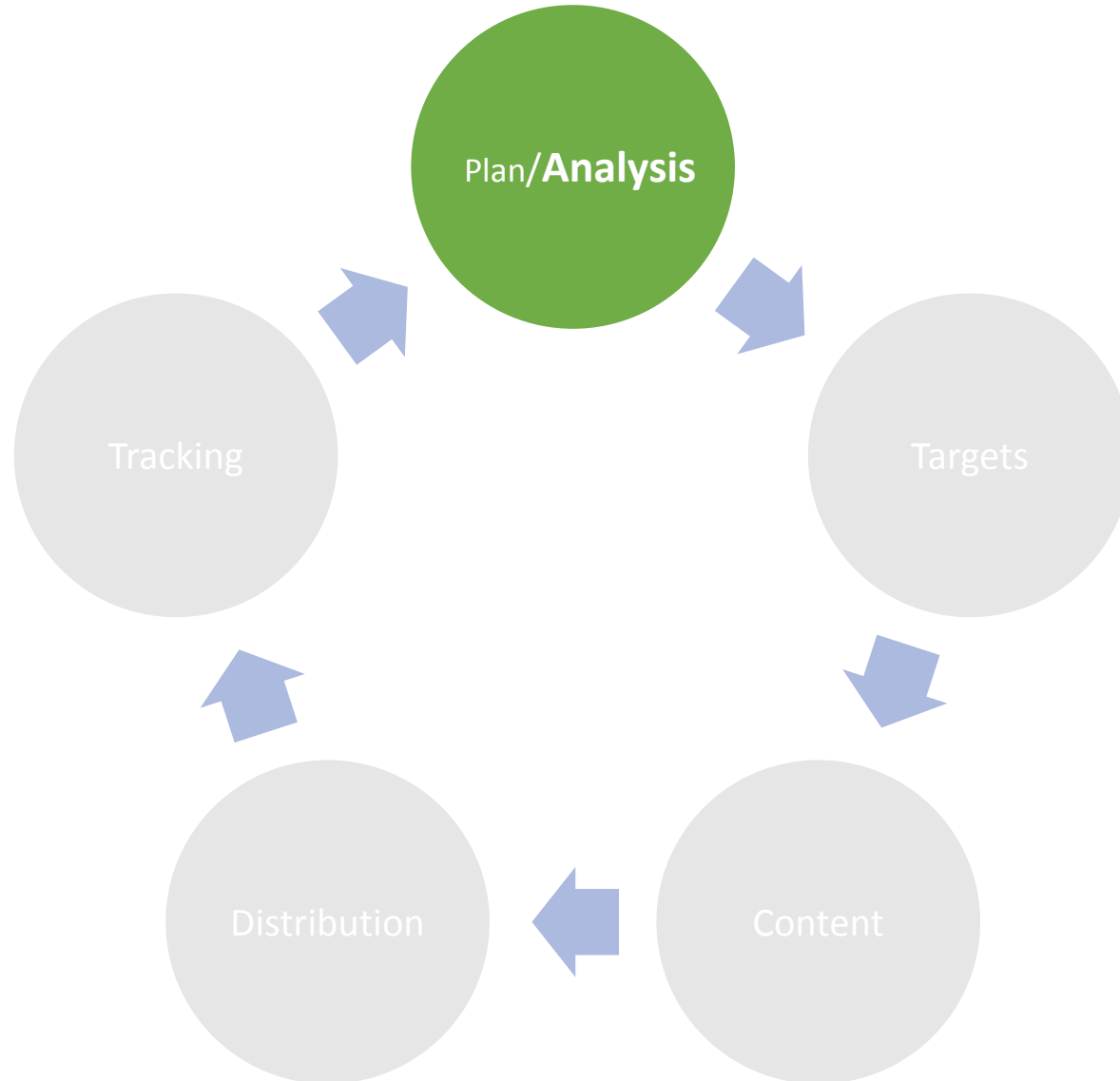
Notes

Lead completed website contact form on 2-6-2022 9:07:47 AM from IP: 174.51.167.131

Lost: right job type, right service area, but unrealistic budget. Will retarget in 30 days

Font ▾ Size ▾ A ▾ **A** ▾ **B** *I* U ~~S~~ ≡ ≡ ≡ ≡ | ↻ |

Lead Process



Plan Analysis

Report	Action	Timing
Lead Contacts	Review and Apply Attributes	Weekly @ Minimum
Lead Channels	Review KPIs	Monthly
Lead Channels	Make Adjustments	Quarterly
Master Plan	Review and Reforecast	Quarterly
Master Plan	Analyze, Adjust, Forecast	Annually

Establish a business practice to review the results with your team and service providers

Determine what is performing and underperforming

Understand the successes in addition to the misses

Plan Analysis

The result of tracking and measuring your plan KPIs are you can look at actual vs. plan

Identify which areas performed or under performed

You can create monthly, quarterly, and annual views

Business Objectives	Actual	Plan	Better/Worse		
Revenue	\$ 2,980,000.00	\$ 2,500,000.00	\$ 480,000.00		
Job Mix					
Additions	\$ 1,432,000.00	\$ 1,020,000.00	\$ 412,000.00	40.80%	48.05%
Kitchen Remodel	\$ 465,000.00	\$ 315,000.00	\$ 150,000.00	12.60%	15.60%
Bathroom Remodel	\$ 203,000.00	\$ 156,000.00	\$ 47,000.00	6.24%	6.81%
ADU	\$ 880,000.00	\$ 1,012,000.00	\$ (132,000.00)	40.48%	29.53%
	\$ 2,980,000.00	\$ 2,503,000.00	\$ 477,000.00	100%	100%
Gross Margin Percentage					
Additions	29.30%	28.00%	1.3%		
Kitchen Remodel	24.00%	22.00%	2.0%		
Bathroom Remodel	26.00%	20.00%	6.0%		
ADU	23.00%	30.00%	-7.0%		
GM total	25.58%	25.00%	0.6%		
Gross Margin Dollars					
Additions	\$ 419,576.00	\$ 285,600.00	\$ 133,976.00		
Kitchen Remodel	\$ 111,600.00	\$ 69,300.00	\$ 42,300.00		
Bathroom Remodel	\$ 52,780.00	\$ 31,200.00	\$ 21,580.00		
ADU	\$ 202,400.00	\$ 303,600.00	\$ (101,200.00)		
GM total	\$ 786,356.00	\$ 689,700.00	\$ 96,656.00		
Overhead	\$ 192,000.00	\$ 192,000.00	\$ -		
NOP	\$ 594,356.00	\$ 497,700.00	\$ 96,656.00		
NOP %	19.94%	19.91%	0.0%		
Average Job Value					
Additions	\$ 89,500.00	\$ 85,000.00	\$ 4,500.00		
Kitchen Remodel	\$ 46,500.00	\$ 45,000.00	\$ 1,500.00		
Bathroom Remodel	\$ 29,000.00	\$ 26,000.00	\$ 3,000.00		
ADU	\$ 88,000.00	\$ 92,000.00	\$ (4,000.00)		
Total Average Job Value	\$ 63,250.00	\$ 62,000.00	\$ 1,250.00		
Number of Jobs					
Additions	16	12	4.00		
Kitchen Remodel	10	7	3.00		
Bathroom Remodel	7	6	1.00		
ADU	10	11	-1.00		
Total Jobs	43	36	7.00		
Gross Margin Dollars by Job					
Additions	\$ 419,576.00	\$ 285,600.00	\$ 133,976.00		
Kitchen Remodel	\$ 111,600.00	\$ 69,300.00	\$ 42,300.00		
Bathroom Remodel	\$ 52,780.00	\$ 31,200.00	\$ 21,580.00		
ADU	\$ 202,400.00	\$ 303,600.00	\$ (101,200.00)		
Total Gross Margin Dollars	\$ 786,356.00	\$ 689,700.00	\$ 96,656.00		
Targeted Leads Per Year	203.30	183	20.30		
Additions	80.00	80	0.00		
Kitchen Remodel	40	28	12.00		
Bathroom Remodel	23.30	20	3.30		
ADU	60	55	5.00		
Close Rate	22.93%	22.50%	0%		
Additions	20.00%	15.00%	5%		
Kitchen Remodel	25.00%	25.00%	0%		
Bathroom Remodel	30.04%	30.00%	0%		
ADU	17%	20.00%	-3%		
Conversions - Actual	43	36	7.00		
Additions	16	12	4.00		
Kitchen Remodel	10	7	3.00		
Bathroom Remodel	7	6	1.00		
ADU	10	11	-1.00		
Lead Value GMD	\$ 16,290.88	\$ 16,625.00	-\$334.13		
Additions	\$ 26,223.50	\$ 23,800.00	\$2,423.50		
Kitchen Remodel	\$ 11,160.00	\$ 9,900.00	\$1,260.00		
Bathroom Remodel	\$ 7,540.00	\$ 5,200.00	\$2,340.00		
ADU	\$ 20,240.00	\$ 27,600.00	\$7,360.00		
Leads from Digital Direct (50% of Sourced)	101.65	91.50	10.15		
Digital Conversions					
Additions	8.0	6.0	2.00		
Kitchen Remodel	5.0	3.5	1.50		
Bathroom Remodel	3.5	3.0	0.50		
ADU	5.0	5.5	-0.50		
Total Sales Conversions from Digital	21.5	18.0	3.50		



Plan Analysis

All of our segments exceeded our plan with the exception of ADU. So let's drill down on that segment

We missed our projected revenue. A contributing factor was a lower GM percentage also resulting in a significant loss in GM Dollars

Revenue	\$	2,980,000.00	\$	2,500,000.00	\$	480,000.00
Job Mix						
Additions	\$	1,432,000.00	\$	1,020,000.00	\$	412,000.00
Kitchen Remodel	\$	465,000.00	\$	315,000.00	\$	150,000.00
Bathroom Remodel	\$	203,000.00	\$	156,000.00	\$	47,000.00
ADU	\$	880,000.00	\$	1,012,000.00	\$	(132,000.00)
	\$	2,980,000.00	\$	2,503,000.00	\$	477,000.00
Gross Margin Percentage						
Additions		29.30%		28.00%		1.3%
Kitchen Remodel		24.00%		22.00%		2.0%
Bathroom Remodel		26.00%		20.00%		6.0%
ADU		23.00%		30.00%		-7.0%
GM total		25.58%		25.00%		0.6%
Gross Margin Dollars						
Additions	\$	419,576.00	\$	285,600.00	\$	133,976.00
Kitchen Remodel	\$	111,600.00	\$	69,300.00	\$	42,300.00
Bathroom Remodel	\$	52,780.00	\$	31,200.00	\$	21,580.00
ADU	\$	202,400.00	\$	303,600.00	\$	(101,200.00)
GM total	\$	786,356.00	\$	689,700.00	\$	96,656.00



Plan Analysis

Also contributing to the ADU segment's poor performance is a lower than planned average job value and 1 less job than planned.

Average Job Value			
Additions	\$	89,500.00	\$ 85,000.00 \$ 4,500.00
Kitchen Remodel	\$	46,500.00	\$ 45,000.00 \$ 1,500.00
Bathroom Remodel	\$	29,000.00	\$ 26,000.00 \$ 3,000.00
ADU	\$	88,000.00	\$ 92,000.00 \$ (4,000.00)
Total Average Job Value	\$	63,250.00	\$ 62,000.00 \$ 1,250.00
Number of Jobs			
Additions		16	12 4.00
Kitchen Remodel		10	7 3.00
Bathroom Remodel		7	6 1.00
ADU		10	11 -1.00
Total Jobs		43	36 7.00
Gross Margin Dollars by Job			
Additions	\$	419,576.00	\$ 285,600.00 \$ 133,976.00
Kitchen Remodel	\$	111,600.00	\$ 69,300.00 \$ 42,300.00
Bathroom Remodel	\$	52,780.00	\$ 31,200.00 \$ 21,580.00
ADU	\$	202,400.00	\$ 303,600.00 \$ (101,200.00)
Total Gross Margin Dollars	\$	786,356.00	\$ 689,700.00 \$ 96,656.00



Plan Analysis

Targeted Leads Per Year	203.30	183	20.30
Additions	80.00	80	0.00
Kitchen Remodel	40	28	12.00
Bathroom Remodel	23.30	20	3.30
ADU	60	55	5.00
Close Rate	22.93%	22.50%	0%
Additions	20.00%	15.00%	5%
Kitchen Remodel	25.00%	25.00%	0%
Bathroom Remodel	30.04%	30.00%	0%
ADU	17%	20.00%	-3%
Conversions - Actual	43	36	7.00
Additions	16	12	4.00
Kitchen Remodel	10	7	3.00
Bathroom Remodel	7	6	1.00
ADU	10	11	-1.00
Lead Value GMD	\$ 16,290.88	\$ 16,625.00	-\$334.13
Additions	\$ 26,223.50	\$ 23,800.00	\$2,423.50
Kitchen Remodel	\$ 11,160.00	\$ 9,900.00	\$1,260.00
Bathroom Remodel	\$ 7,540.00	\$ 5,200.00	\$2,340.00
ADU	\$ 20,240.00	\$ 27,600.00	-\$7,360.00
Leads from Digital Direct (50% of Sourced)	101.65	91.50	10.15
Digital Conversions			
Additions	8.0	6.0	2.00
Kitchen Remodel	5.0	3.5	1.50
Bathroom Remodel	3.5	3.0	0.50
ADU	5.0	5.5	-0.50
Total Sales Conversions from Digital	21.5	18.0	3.50

ADU number of leads met plan

But our conversion rate missed plan

Leads from Digital also missed plan

ADU Segment Diagnosis

Number of total leads and sales were close to plan

Gross Margin and Average Job Value were well below

Questions to consider:

Did the market shift?

Did we not price the jobs right?

Did we take jobs below our targets due to poor quality prospects (leads)?

Did we lower our price to get the job?

Plan Adjustments

Operational Review

ADU Margins.

Do we have production issues?

Are we priced right?

Did we overstate the market?

Did our costs exceed plan?

Do we have an estimating problem?

Did we bid lower to get the job?

Revenue	\$	2,980,000.00	\$	2,500,000.00	\$	480,000.00
Job Mix						
Additions	\$	1,432,000.00	\$	1,020,000.00	\$	412,000.00
Kitchen Remodel	\$	465,000.00	\$	315,000.00	\$	150,000.00
Bathroom Remodel	\$	203,000.00	\$	156,000.00	\$	47,000.00
ADU	\$	880,000.00	\$	1,012,000.00	\$	(132,000.00)
	\$	2,980,000.00	\$	2,503,000.00	\$	477,000.00
Gross Margin Percentage						
Additions		29.30%		28.00%		1.3%
Kitchen Remodel		24.00%		22.00%		2.0%
Bathroom Remodel		26.00%		20.00%		6.0%
ADU		23.00%		30.00%		-7.0%
GM total		25.58%		25.00%		0.6%
Gross Margin Dollars						
Additions	\$	419,576.00	\$	285,600.00	\$	133,976.00
Kitchen Remodel	\$	111,600.00	\$	69,300.00	\$	42,300.00
Bathroom Remodel	\$	52,780.00	\$	31,200.00	\$	21,580.00
ADU	\$	202,400.00	\$	303,600.00	\$	(101,200.00)
GM total	\$	786,356.00	\$	689,700.00	\$	96,656.00



Plan Adjustments

Sales & Marketing Review

ADU Sales Conversions.

Are we positioned correctly?

Do we need sales training?

Are there new competitors?

Are we targeting our leads correctly?

Targeted Leads Per Year	203.30	183	20.30
Additions	80.00	80	0.00
Kitchen Remodel	40	28	12.00
Bathroom Remodel	23.30	20	3.30
ADU	60	55	5.00
Close Rate	22.93%	22.50%	0%
Additions	20.00%	15.00%	5%
Kitchen Remodel	25.00%	25.00%	0%
Bathroom Remodel	30.04%	30.00%	0%
ADU	17%	20.00%	-3%
Conversions - Actual	43	36	7.00
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Additions	8.0	6.0	2.00
Kitchen Remodel	5.0	3.5	1.50
Bathroom Remodel	3.5	3.0	0.50
ADU	5.0	5.5	-0.50
Total Sales Conversions from Digital	21.5	18.0	3.50

Plan Adjustments

Lead Review

Where did we source the ADU's we sold?

Can we exploit the higher conversion channels?

Are we sourcing leads from the right locations?

Are there ways to use digital marketing to help traditional marketing segments?

Source	Percentage	Lead Count	Close Count	Conversion Rate	Average Job Value
Digital Direct	51%	105	22	21%	\$ 73,066.67
Calls	27%	55	10	18%	\$ 56,000.00
Emails	6%	12	3	25%	\$ 75,200.00
Contacts	19%	38	9	24%	\$ 88,000.00
Digital 3rd Party	8%	16	2	13%	\$ 50,800.00
Angies List	0%	0	0	0%	\$ -
BBB	0%	0	0	0%	\$ -
5 Star Rated	4%	8	1	13%	\$ 57,000.00
Home Advisor	0%	0	0	0%	\$ -
Houzz	4%	8	1	13%	\$ 44,600.00
Referrals	12%	25	6	24%	\$ 75,300.00
Signage	4%	8	1	13%	\$ 65,400.00
Networking	9%	18	5	28%	\$ 67,000.00
Events	7%	15	4	27%	\$ 68,700.00
Print Advertising	6%	12	2	17%	\$ 34,800.00
Direct Mail	0%	0	0	0%	\$ -
Geo-Farming	0%	0	0	0%	\$ -
Sponsorships	0%	0	0	0%	\$ -
Radio	0%	0	0	0%	\$ -
Billboards	0%	0	0	0%	\$ -
Unknown	2%	5	0	0%	\$ -
Sub-Total	49%	99	20	20%	\$ 58,971.43
Total	100%	204	42	21%	\$ 63,200.00

Created Date	Lead Name	Location	Sold Or Not Sold	Job Type	Sources	Quote	Revenue
Jan 27	Stasaitis Marc	Eldorado Hills	Sold	Addition	Contact Form	\$86,250	\$86,250
Jan 5	Gibbs Jeff and Lisa	Cameron Park	Sold	Addition	Contact Form	\$87,000	\$87,000
Jan 19	Wiesner, Judy & Fred	Placerville	Sold	Addition	Google	\$150,000	\$150,000
Jan 22	Smith David	Pollock Pines	Sold	Addition	Referral- from Past Client	\$125,000	\$125,000
Jan 13	Shisher	Folsom	Open	Addition	Referral-Realtor	\$0	\$0
Jan 18	McGregor, Brian and Sheri	Eldorado Hills	Not Sold	Addition	Signage	\$119,000	\$0
Jan 29	Gonzales Matt	Coloma	Not Sold	ADU	Houzz	\$95,000	\$0
Jan 26	Cleveland, Matt & Cindy	Eldorado Hills	Sold	ADU	Contact Form	\$200,000	\$200,000
Jan 2	Christie, Jackie & Doug	Placerville	Open	ADU	Referral-Realtor	\$0	\$0
Jan 9	Hardy Tevi	Cameron Park	Open	Bathroom Remodel	Contact Form	\$0	\$0
Jan 25	Sivalingam, Danielle	Camino	Sold	Bathroom Remodel	Google	\$34,895	\$34,895
Jan 7	Matthews, Mike	Citrus Heights	Sold	Bathroom Remodel	Google, YELP	\$27,000	\$27,000
Jan 18	Romero Edmond	Citrus Heights	No Opportunity	Garage Conversion	Contact Form	\$0	\$0
Jan 15	Lundy Shane	Cameron Park	Open	Kitchen Remodel	Contact Form	\$0	\$0
Jan 18	Alocozy, Mary	Rancho Cordova	Sold	Kitchen Remodel	Houzz	\$37,600	\$37,600
Jan 29	Sfdish, Kumar	Diamond Springs	Sold	Kitchen Remodel	Referral- from Past Client	\$45,000	\$45,000
Jan 22	Crosby Jon	Folsom	Sold	Master Suite	Contact Form	\$56,400	\$56,400

Plan Adjustments/Actions - ADU Segment

Operations

- ★ Review segment productivity and cost structure
- ★ Determine if available lot size is a factor
- ★ Determine if a higher volume, lower average job value model is viable
- ★ Review estimates for opportunities

Sales & Marketing

- ★ Review market demand and price points
- ★ Do a competitive analysis
- ★ Identify differentiation and align sales and marketing to it
- ★ Review sales pitch and investigate sales training options
- ★ Review leads and how they were sourced

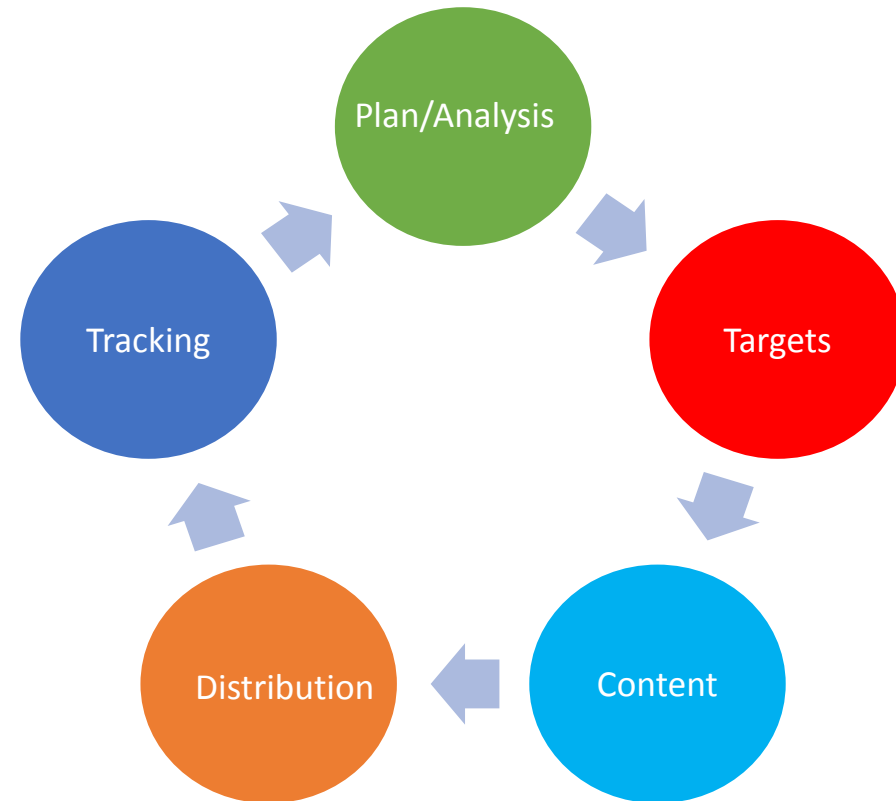
Digital Marketing

- ★ Modify website content for SEO improvement
- ★ Modify GBP content
- ★ Consider providing an ADU downloadable to boost engagement
- ★ Review and adjust market targets
- ★ Review Search Ad performance
- ★ Consider an ADU e-mail campaign to previous clients
- ★ Review the categories that are performing and determine if ADU is adequately represented

Close the Loop

After addressing the adjustments and actions you identified, update your plan and follow the process again

Congratulations! You now have a Closed Loop Feedback System for your business



Wrap-up

- Digital Marketing is a vital part of your business processes
- The more integrated it is with your planning process the more effective it is
- The wrong leads can undermine your top line plan
- Having a closed loop planning and monitoring process adds value across the enterprise
 - Gives you insights to your entire business
 - Holds the organization accountable
 - Learn and adjust. Data and information are power. Know what works and move toward more of that. Know the real score
 - **In God We Trust, All Others Bring Data.**
- If you choose to get help with your marketing initiatives:
 - Make sure they understand your financial plan and how marketing and sales support it.
 - Make sure they can articulate the goals in terms of milestones. Time, results, key performance indicators
 - Make sure they can help you get to where you want to go long term
- Keokee Offer: Lead Management Closed Loop Downloadable
 - **Visit keokee.com/lead-management**

We'd greatly appreciate your feedback!

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