

# MARKET LIKE A PRO!

## *BATTLING SUPPLY & DEMAND*



SUPPLY SHORTAGES  
HIT TRADES  
**"IT IS  
ABSOLUTELY  
EVERYWHERE."**

*Written By Industry Experts*



**ServiceTitan<sup>®</sup>**  
Marketing Pro

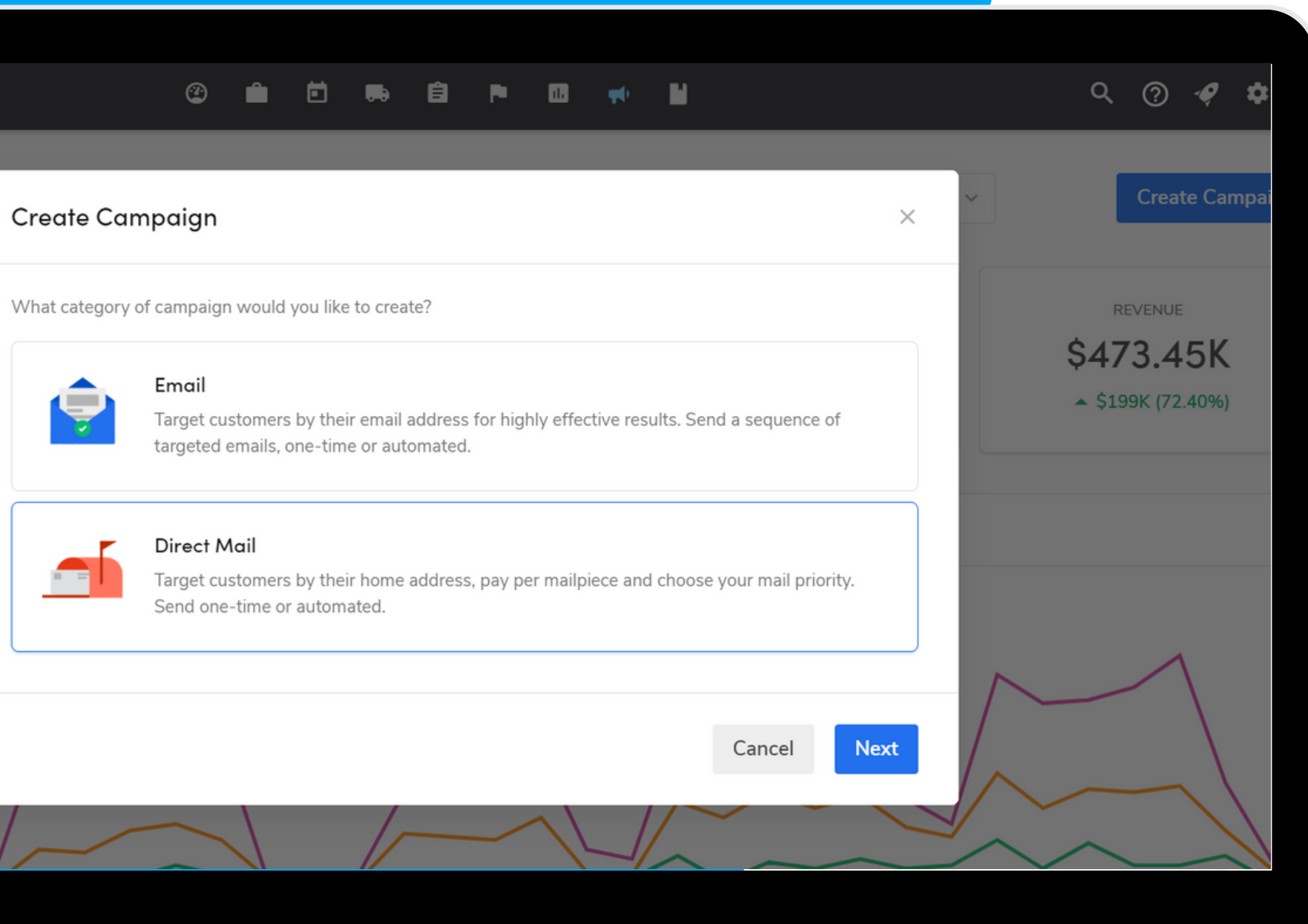


## Marketing Just Got Personal

ServiceTitan Marketing Pro is a hyper-targeted, integrated marketing solution that utilizes your client data to create individual customer journeys.

### Table of Contents:

- The Industry Changes and Impact Happening Today
- Marketing Opportunities Everywhere!
- Supply & Demand Marketing with Fall Fun!
- Membership Nurturing Marketing
- Preparing For The Weather Marketing
- #MarketingMonday
- Additional Resources



# Industry Impact

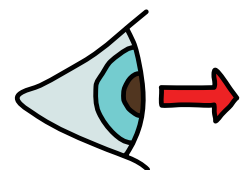
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We all know what's going on within the trades today, but as a reminder, here's what we're experiencing:

- Labor shortages/hiring issues
- Equipment shortages
- Rising inventory prices across the board
- Delayed and limited distribution of ordered products
- NEW privacy laws
- Mergers and Acquisitions from Equity Groups
- Increased importance of data integrity, management, and security
- The "Year Of The Home" is changing to "Anywhere But Home"

When it comes to changing the tone of your marketing, it's important to remember these problems can help create urgency in replacement and membership opportunities. However, you must convey the message with empathy and authenticity.

Our end goal is to always find a solution to solve our customer's problems. We're the trades, and we show up!



[Learn more and watch the Supply Chain Crisis Webinar With Chris Hunter, David Closs and Bret Van De Huevel](#)



# Let's Take Massive Action!

Whether we like it or not the trades can be impacted by equipment shortages, capacity shortages, truck shortages and we need to focus on all of these efforts in order to sustain.

In the Fall particularly our season can slow down and then ramp up quickly, It is important to deliver the right message, at the right time, to the right person.

**There is opportunity in the shortages we are seeing! Let's go find it!**

We aim to help clients create opportunity. Now demand creates opportunity, but it can also create headaches. To market well, you'll need to leverage a segmented audience, automate, and schedule—all while aligning to dispatch for profits in any business model.

Our equipment shortage, we're hiring, and fall special templates can help provide tips and tricks for the home with subtle messaging regarding the shortages and prices we're seeing.

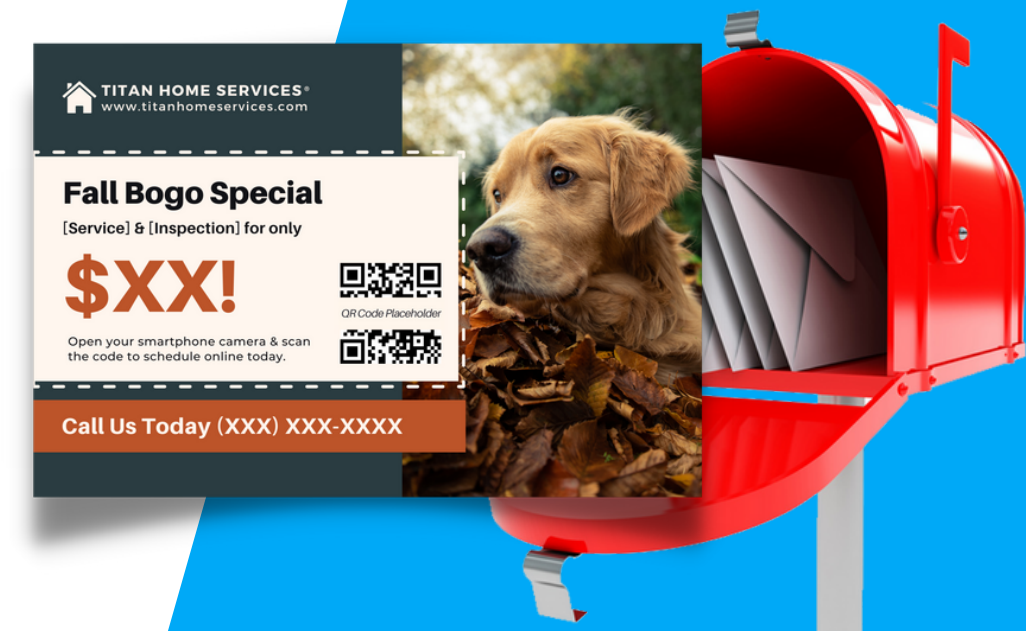
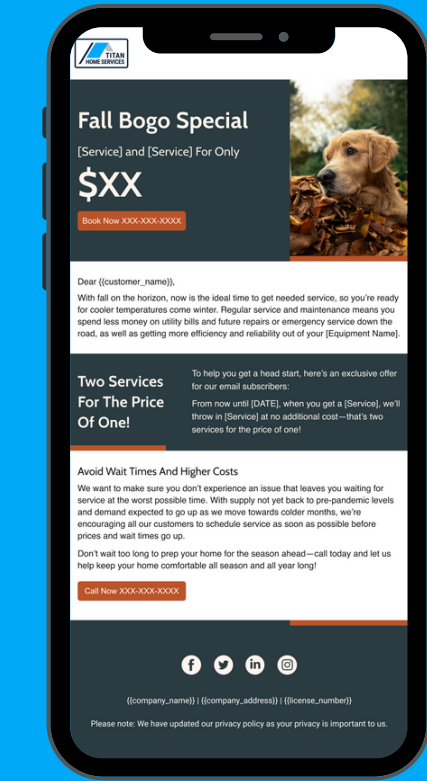
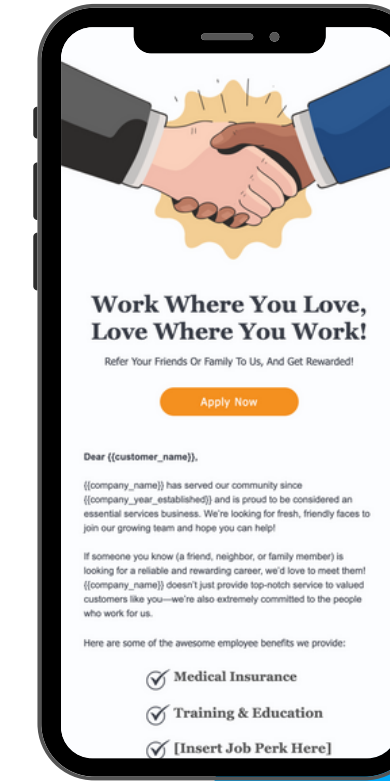
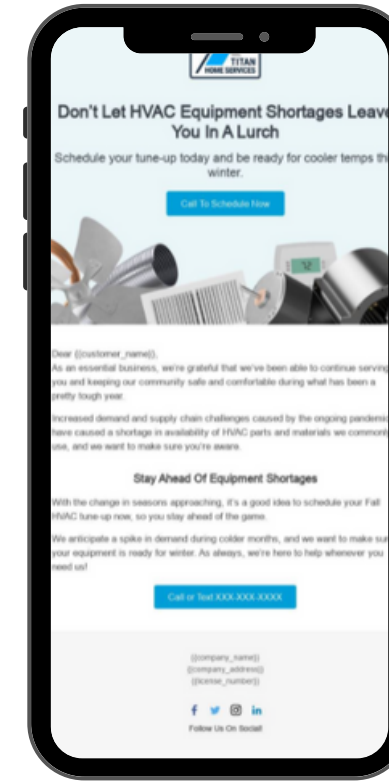
## Utilize These Templates With Direct Mail!

Audience Ideas:

- Existing clients with no service within the past year
- Existing Clients with no service within the past six months
- Add to your existing client newsletter series
- Change messaging a bit, and send to members *(Hint: always separate your members from your existing clients. Members tend to respond differently.)*



[Click to Read Our Blog On 5 Revenue Driving Marketing Campaigns You Customers Will Remember You By](#)





# Marketing Opportunities

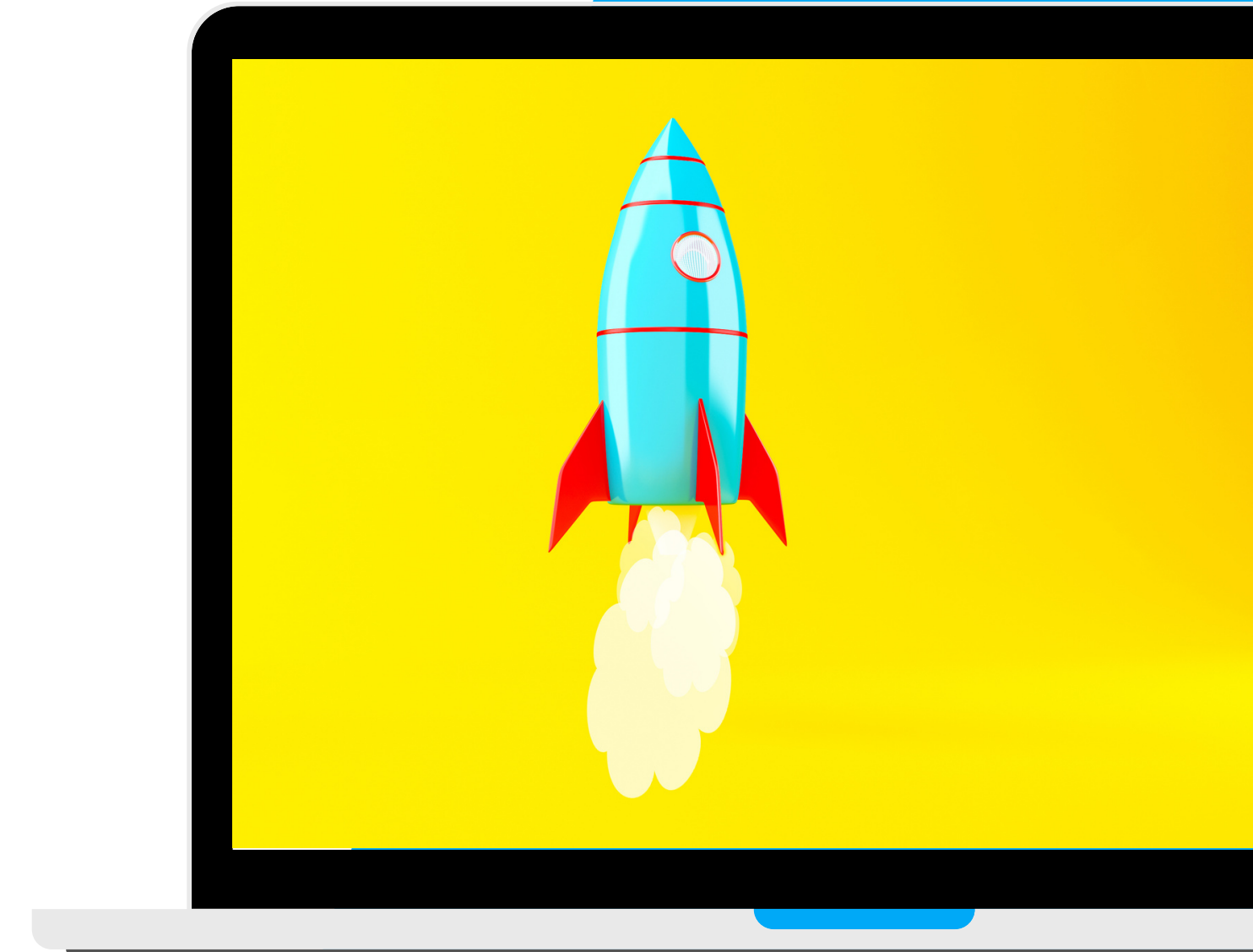
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## Marketing Opportunities Are Everywhere!

Let's learn together about some ways to automate, so we maximize the use of our time. Here is a short list of items to think about, as consumer behavior and the overall industry changes.

- The overall tone of messaging will change
- You'll need to evaluate prices in order to keep up with supply and demand, and market efficiently and effectively.
- Evaluate every conversion opportunity. Even if you're hitting your goal, it's time to #TitanUp .
- Inventory management and warehousing is key.
- You'll want to focus on data attribution in advertising with tools like DNI (dynamic number insertion), collecting and hosting data so we can market smarter.
- With digital already crowded, add on layers like direct mail to your brand. These are traditional efforts, but will help grow digital and main lines.
- Open a discussion with all vendors regarding new marketing and distribution strategies. (They can help—co-op dollars!)
- Replacement Marketing - *Leading with financing*
- Increase membership nurturing—the goal is add-ons! In retail, we used to say, "How can we add one more item to the basket?"
- Update your IT and data security and strategize to maintain data integrity, or you could get fined!

[Click here to Read Advice from Tom Howard, Owner of Lee's Air on how to retain your team.](#)



# Membership Nurturing

## How To Win Over New Members

Recurring revenue is a great extra deferred revenue source, and these new members will also be your biggest fans! In the trades, we sometimes forget to speak and provide value to these clients all season long, because we want to run these calls during specific months.

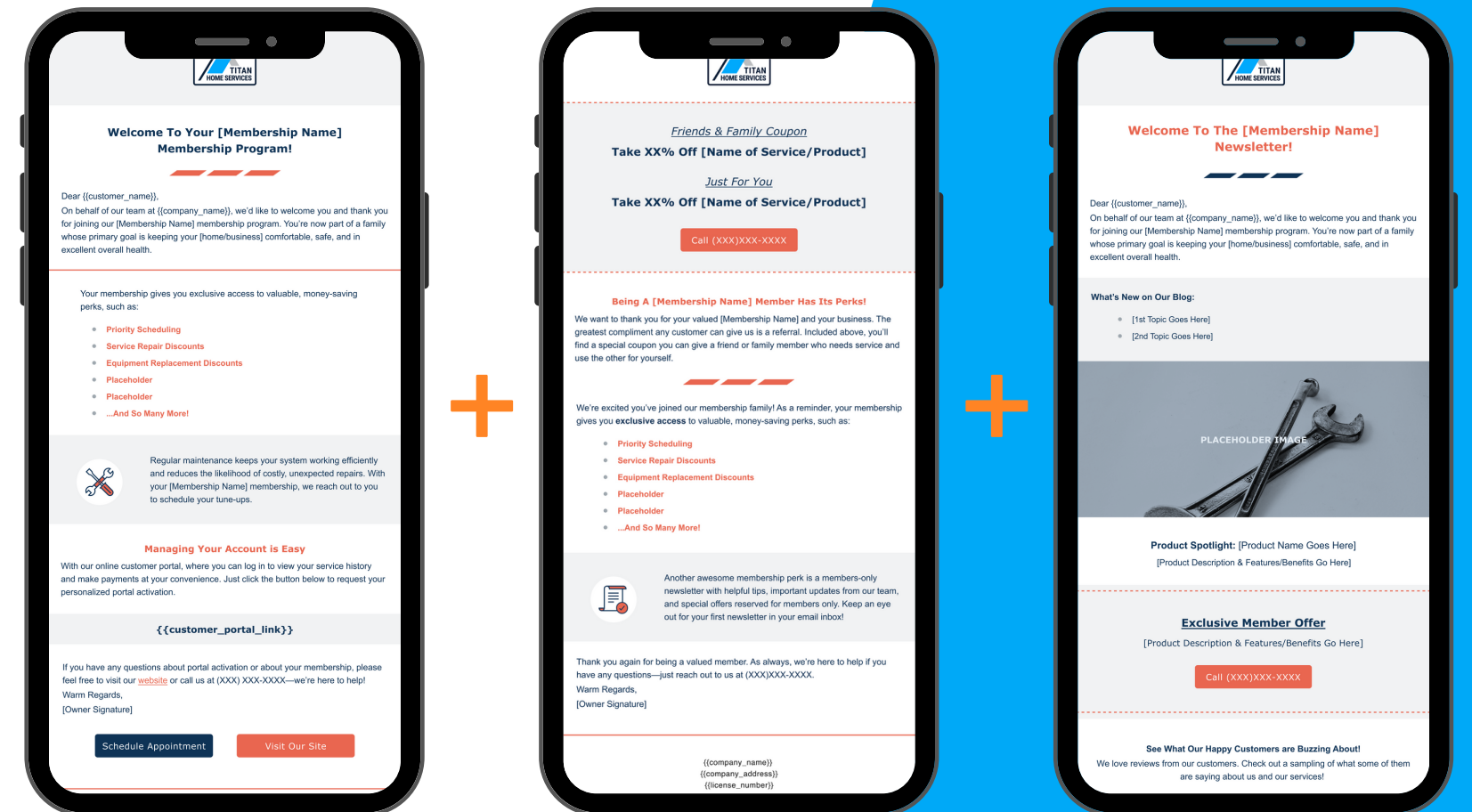
How often you'd like to speak to members to reduce churn and add value is a business decision. We're working on direct mail to complement this, but for now, try adding a layer of direct mail with an extra value item. You can offer small swag, brochures, equipment safety stickers, personalized thank you letters from the CEO, and so much more.

It's more important than ever to engage members early and keep engagement high throughout the customer journey. If you don't have a membership program, phone a friend in your industry—we've seen many different commercial and residential programs.

The trades show up, so ask the communities, and they can help! Welcome new members, and keep them engaged by showcasing your company's value through membership. (Example: Start a membership newsletter sequence, using a drip campaign like the one on the right.)

- Drip 1: Welcome New Members
- Drip 2: Member Benefits and Savings Reminder
- Drip 3: Introduction to Newsletter Series
- Drip 4: Newsletter Series

Up to 12 drips! (Keep it going) - Be sure to automate this!!



# Recapture Recurring Revenue

Create email or direct mail drip campaigns for expiring memberships

These campaigns get better over time with viewable conversion metrics within Marketing Pro. So for now, the intent is to go after a missed opportunity that's usually a manual process for us in the trades, and automate it with email and direct mail.

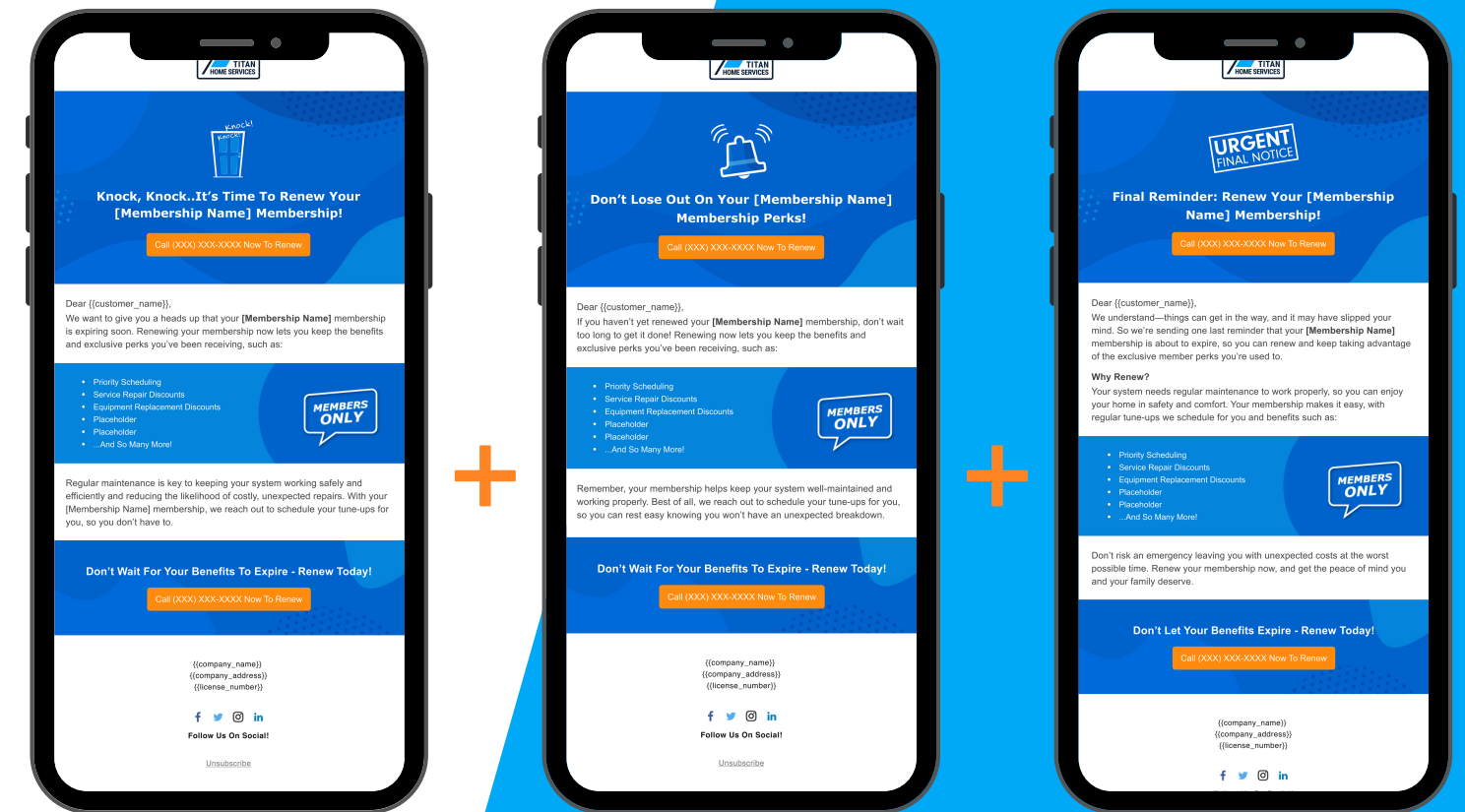
## Template Intent

These expiring membership drip campaigns contains three pieces, so your business can increase membership retention and recurring revenue, as well as reduce churn in an automated, efficient email or direct mail process.

## Audience Build Idea

- Membership set to expire 30 days in the future
- Membership set to expire 60 days in the future
- Membership set to expire within a short time frame (ex: 3 days in the future. Then utilize drip emails 2 & 3 for those with more urgent expiration dates.)

## Sample Audience LINK





# Wacky Weather

Reminder: These templates are editable and can be used in ANY weather situation. Get easy tips on how to modify them in the video tutorial below.

## Let clients know safety is your top priority!

When weather, a natural disaster or a disruptive event brings about the unexpected, it's important to keep your team safe and your clients updated.

## Template Background & Intent

2021 and the weather...Well, Texas lost power, Oklahoma was spotty and frozen, many of our states are flooding from hurricanes and plumber shortage threw a wrench in repair efforts. Oh, and let's not forget the supply and demand issues on top of everything else! Whew! It was intense, but the trades showed up time and time again.

These templates are to create brand awareness in the event of a weather service interruption, delay, or business closure. After an event, you can edit and send a community awareness template titled "Natural Disaster." Tips to edit template based on any natural disaster occurrence are below.

## Tips and Ideas:

Design update ideas to utilize in any event: [LINK](#)

Video: Audience for reschedule request templates: [LINK](#)



## Additional Inclusions/Exclusions:

- Scheduled jobs for specific business units
  1. Example: Select HVAC services
  2. Job Type: Tune-ups
  3. Scheduled Job Date: X days in the future
- Email scheduled non-members to move them further down the call board. Normally, members have priority. That priority is then broken down by job type and opportunity/demand.





# When You Build a Culture, You Can Build a Brand.

Now's the time to step up and really hone in on the value of your services by showcasing your culture, your clients, your team, and your community.

A simple thank you email can go a long way for a brand, and you can measure this KPI in so many ways. When you build a brand, it's important to start with your culture and speak a common service language. Strive to be remarkable in every way you can—with your team, with your customers, with everyone.

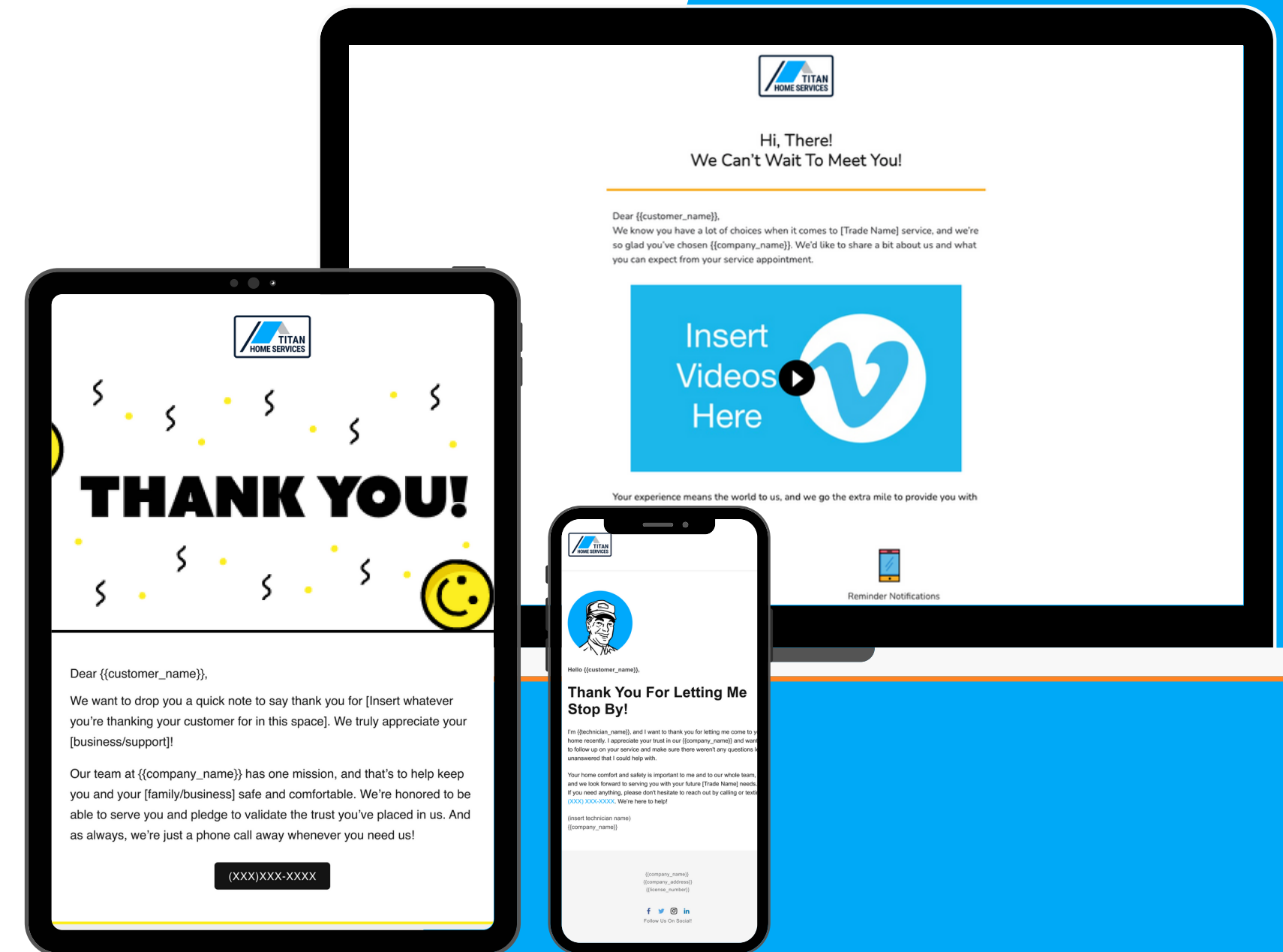
One strategy to test: Bring back the small business brand in your community through partnerships, donations, etc. Our goal in life is to help others. We're the trades, and we show up!

## How To Build A Culture- Great Marketing Book Recommendations:

- [Purple Cow by Seth Godin](#)
- [Contagious by Jonah Berger](#)
- [How Google Works by Eric Schmidt](#)

## Awesome Branding Webinar to Watch:

Focus On Building Your Business With These 4 Marketing Moves with Matthew Tyner of Williams Comfort and Air and Crystal McWilliams with McWilliams and Son and Lemonseed Marketing. [LINK](#)



# Add One More Item To The Basket

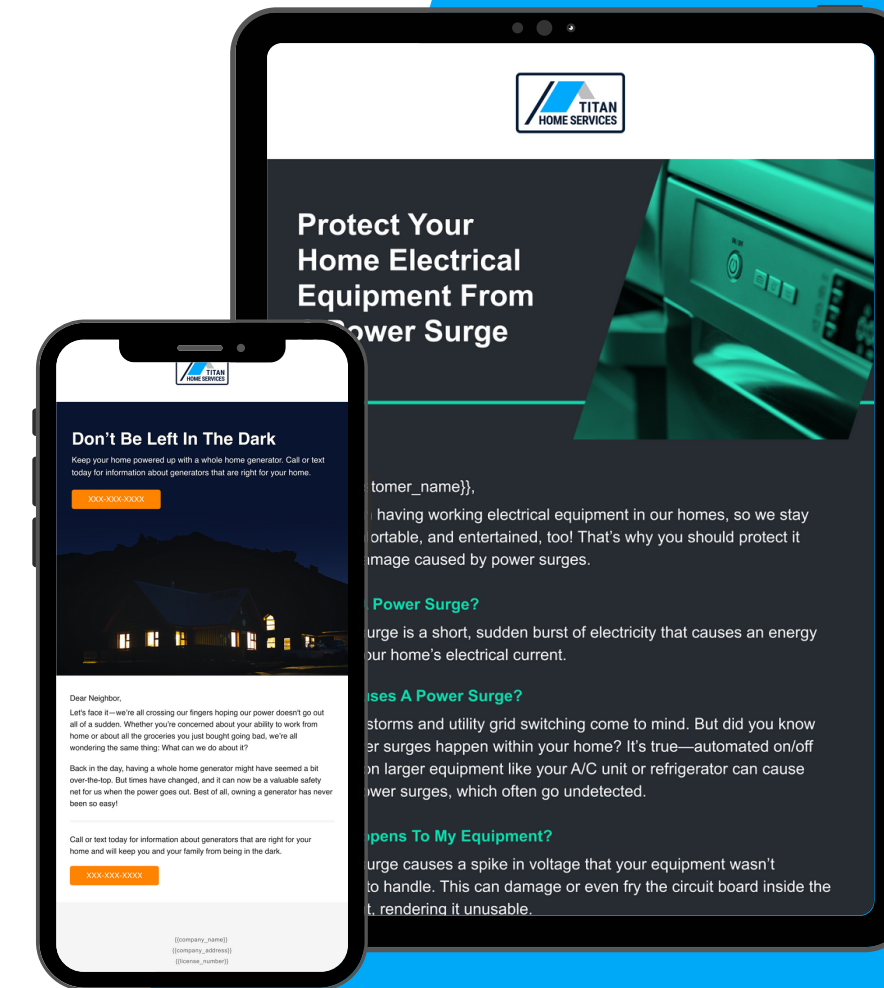
Earlier, we mentioned adding one more item to the basket. Well, the same goes with selling replacements. This normally comes in terms of membership.

You want to add on products, not change orders, and sell what customers need to provide a solution to their problem. We've created many templates where you can place a product in the text vs. a service.

## Product Marketing

If you have a customer portal that houses unpaid invoices and open estimates, now's the best time to create a template introducing it to customers and showing them how to get in. Use these templates in an unsold estimate campaign, existing client newsletter series, or a membership newsletter. They're great additions to automated campaigns.

Hint: Don't forget to send a "Request An Invitation!" email to customers, so they can activate their portal access. Ask your CSM to ensure the portal feature is enabled.



# Conquering Your Reputation

Sometimes it feels like one bad review can make or break your day

We've all been there. However, there is good in every review, whether good or bad because there's opportunity for improvement and FREE feedback. A great review is GOLD and should be praised throughout the organization. It's all about how you manage this with strategy.

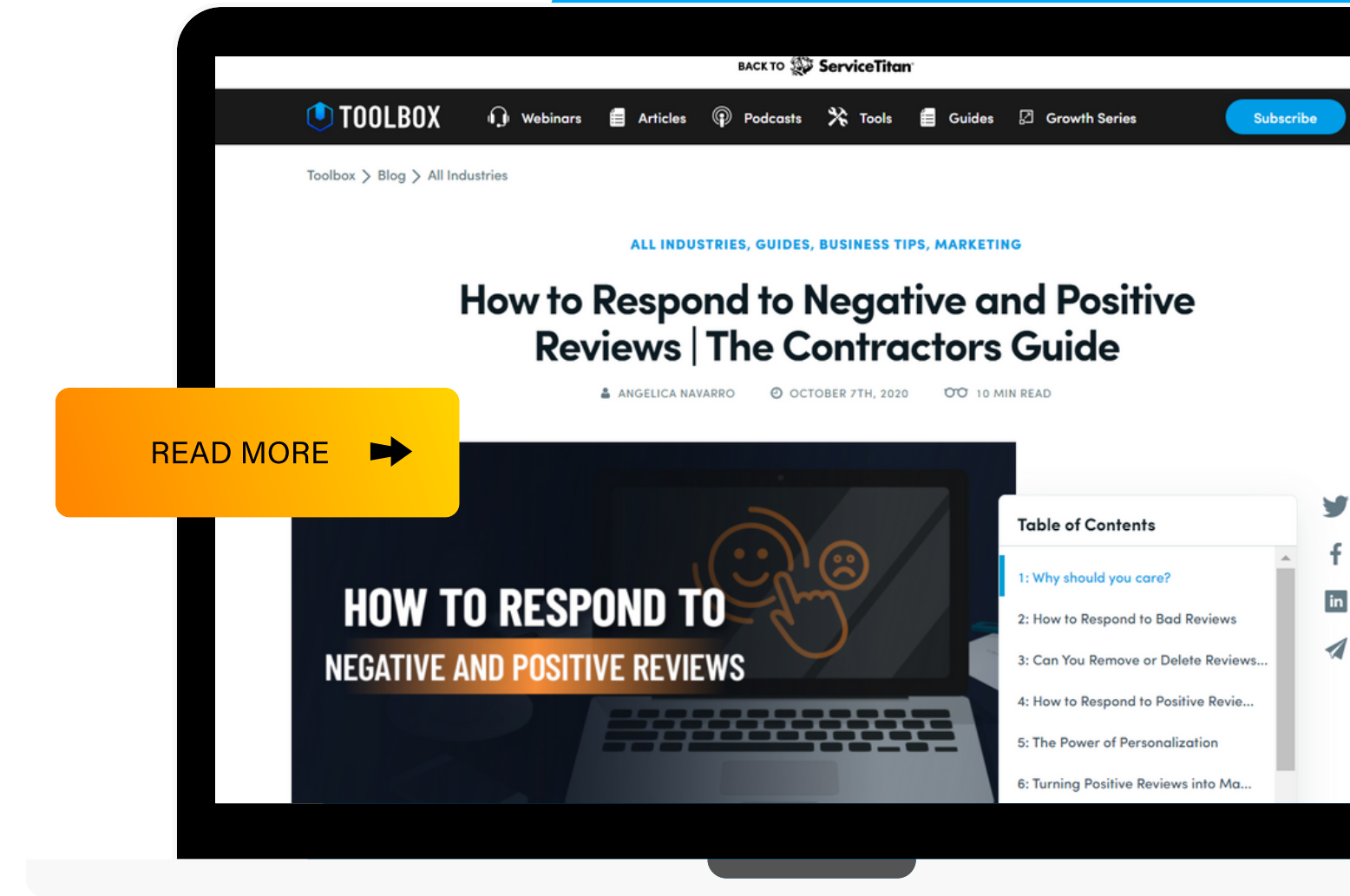
## Let's Talk Strategy

- Work towards speed-to-lead, including responding to reviews. Is it time for a digital CSR team?
- Monitor and disposition reviews in certain platforms with speed, and ensure ALL reviews, both internal and external, get a response. The faster, the better.

(Hint: Create several scripts for different scenarios, and personalize the experience. Draft responses for positive and negative reviews.)

- Create an owner's social media strategy—this can look like the response is coming directly from the owner's account. Be very authentic, and speak the way the owner speaks.
- Your review management tool will bring in reviews, but you can always add review messaging to your marketing material. It's a mental switch that triggers a memory when we repeat images and messaging.
- Incentivize and reward your team—not only with spiffs, but with praise and love in monthly presentations, social media and video content. Tag them, so their friends and family can see them! They deserve to be seen, known, and heard. They deserve the BIG win!

People buy from people. They don't see the product, but rather the culture of the business and the person standing right in front of them.



[Learn about Marketing Pro Reputation Management](#)



# Innovate With Direct Mail

## Direct Mail Template Gallery

We have all heard it: "Direct mail is dead, direct mail is expensive, direct mail takes too much time, and I'm not sure of the return. It's branding."

You wouldn't be wrong about the majority of those statements. However, direct mail is a monthly strategy that can be automated and layered with other existing marketing channels.

You might see the lead come from digital, but the shift in direct mail from 2019 to 2021 has been a transformation from traditional to digital, to digital with traditional, and more and more layers. It takes about 16 exposures to capture a conversion, and consumer behavior is evolving constantly.

## Direct mail used to be 60% of prospect lead generation

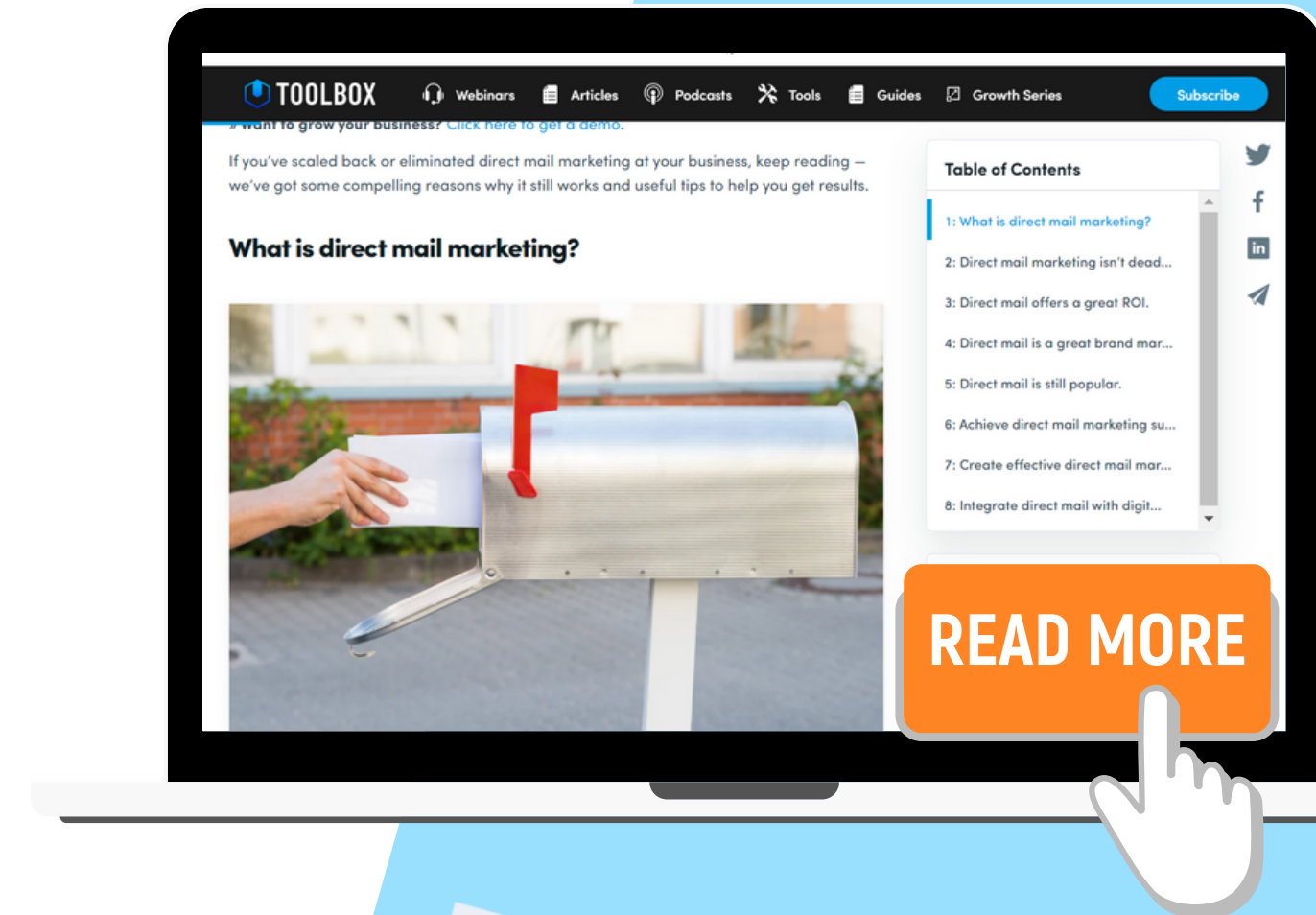
But digital came about big, and boom—it took off in 2020. And one of the reasons why is because you can track it easily. So direct mail kind of fell by the wayside!

But what if we could get better at attribution with QR Codes, special UTM parameters and individual landing pages with URL-specific call-to-action intent?

What would we do if we innovated direct mail in the trades? What if we utilized property data to build an audience and gain market share impression in a neighborhood without wasting spend on properties we don't want in our audience?

The "what-if" is possible—we just have to innovate.

## Learn about Marketing Pro Direct Mail





# #MarketingMondays

## Meet Sarah Ghirardo

Your #MarketerInTheTrades, she is the Senior Marketing Operations Manager for ServiceTitan Marketing Pro. She comes from the trades as a Director of Digital Marketing for a large (\$50m+) residential HVAC company in northern California.

She was a 2020 winner of Top 40 under 40 for ACHR news, is current co-chair of LadyTitans, and dedicates her career to giving back to the trades.

What is #MarketingMonday? Watch [HERE](#)



Marketing Monday is where we will talk about all things marketing in the trades. We will bring out other #MarketersInTheTrades and #MarketersForTheTrades to speak and talk about marketing topics that are relevant and can help your business grow! We're here to help!

- #MarketerForTheTrades: How To Choose The Right Vendor with Joshua Crouch of Relentless Digital [Watch HERE](#)
- #MarketerInTheTrades: How To Choose The Right Vendor with Matthew Tyner of Williams Comfort and Air [Watch HERE](#)
- #MarketerForTheTrades: Learn about the Facebook IOS update and what action you need to take with Ad Leverage's Brianna Skiffington and Jeffrey Faehnle [Watch HERE](#)
- #MarketerInTheTrades- How I Brand with Jacki Bradbury, owner of Bradbury Brothers [Watch HERE](#)



# #LADYTITANS

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LadyTitans is a group that empowers women to be better at what they do and help others see the value of women in the trades. We aspire to change the trajectory of the industry to not be viewed in the world as solely male-dominated.

Although this group focuses specifically on the topics above, allyship is a core pillar of this group. All people in the ServiceTitan community are welcome to join LadyTitans.

## Ask your team members to join us on our mission

What Have Our LadyTitans Have Been Up To:

The group started with 3 women in the trades ( Stacy Fore, Jessica Woodruff Smith, and Lauren Vahey) who wanted more out of the industry for women. They banded together, went straight to co-founder Vahe Kuzoyan, and told him #ThisWasNotADrill and asked to start a women's empowerment group. The group is now about 6 months old and boasts over 600 members!

The question isn't what do we do—it's what haven't we done yet...

- Monthly Meetings - Some recent topics presented:
  - Change Management - Presenter: Amy Herman, ServiceTitan
  - Finding Your Why - Presenter: Sarah Ghirardo, ServiceTitan
  - Service Specialties In Starting Fresh and Making It Count - Presenter: Rachel Stepoway, ServiceTitan
- Book Club
- Dare To Lead Hosted by Renee Lennox
- The Happiness Advantage: The Seven Principles of Positive Psychology That Fuel Success and Performance at Work Hosted by Rachel Stepoway

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- Virtual Networking Events
- Fitness Challenges
- Facebook Internal Community Building (members only)
- Organizational Partnerships
- Tools & Tiaras Partnership
- Volunteerism, Sponsorship, Mentorship..... and this has just begun!

[LadyTitans Enrollment Form](#)

[LadyTitans Facebook Community](#)



# Resources

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Not yet on Marketing Pro?

----- [Email marketingpro@servicetitan.com](mailto:marketingpro@servicetitan.com)

Marketing Pro customer?

----- [Join our Facebook Group](#)

Need help getting started?

----- [Contact your CSM](#)

Technical issues?

----- [Contact support@servicetitan.com](mailto:support@servicetitan.com)

Direct Mail Templates

----- [Template Gallery LINK](#)

For additional resources, please visit the [Marketing Pro Website](#)



**YOU'RE THE PRO NOW!**

***GO GET EM!***



***Written By Industry Experts***



**ServiceTitan<sup>®</sup>  
Marketing Pro**