

May Marketing Plan

Failing to plan is planning to fail INTENTIONALLY.

May Strategy: May is end of school, beginning of vacation and warm weather: Capitalize on this with massive pre-season or early season replacement offers and pre or early season tune-up or performance maintenance or monster maintenance offers. This is the time to snatch leads and sales from competitors waiting on the weather. If you miss sales now, you miss them for the year. Be very aggressive.

Consumer Tips: Check and replace filters as needed; Refresh, replace, and add to attic insulation; Clean condensing unit coil; Perform bi-annual cleaning of clutter around furnace/boiler; Set AC to no lower than 78F to save up to 40% on energy; Clean dryer vent hose; Fix leaky faucets and pipe fittings and running toilets; Drain water heater to clean out sediment; Install low-flow showerheads; Replace at least 3 incandescent light bulbs with energy efficient CFL or fluorescent bulbs.

Pre-Plan June: Continue hitting media hard, but plan on a slowdown of direct response in favor of Branding and Identity ads as the weather begins to add to your lead count. Discounting or value-adding incentives from pricebooks becomes less of an issue, and better value-selling techniques take over. Plan on a Competitive Intelligence survey this month or next. Get ready to blow your replacement sales wide open. Maintenance offers can continue at a premium price since people delayed into high demand service season. You need to cover costs of higher wage-earning techs running tune-ups and tune-ups pushing maintenance techs into overtime.

Recruitment Marketing: Equip all personnel with recruitment marketing business cards that allow them to hand out to tradespeople or mechanically inclined people with good attitudes they encounter in the day or place them on tradesperson vehicles. If their card is mentioned when a qualified candidate calls, they get a spiff. If their candidate gets hired, they get a bonus.

DEPARTMENT STRATEGIES:

Replacement and Add-on: Capitalize on warm weather with pre-season and in-season offers and maximize technician generated leads. Bundle your services and promote high quality. Promote trade-in allowances, manufacturer and utility rebates, and 0% and low APR long-term payment plans with NO MONEY DOWN. You can make the same offer to the public via a direct mail letter, newspaper ad or FSI and support it all on the billboard radio, TV and OTT. If you are not as busy as you'd like, use your hardest-hitting direct response offers to your best list and most penetrated zip codes.

Service and Maintenance: Technicians should be performing pre-season tune-ups as well as generating equipment leads on repairs over \$300 or 8-year-old systems as well selling maintenance agreements, accessories, and duct cleaning. Focus on how your service can prevent problems and time and money. Promote Spring tune-ups in the newspaper, free-standing inserts, direct mail and/or a postcard or coupon mailer (Val-Pak, ADVO, Super Coups, Clipper Magazine, Shoppers Guide or Penny Saver). Capitalize on warm weather via tune-ups and demand service calls. Use flyers for promotions for techs to handout. Techs should also use Repair vs. Replace educational handout. Replay a technician script to drive agreement sales. Let customers know you'll take care of them now and all Summer.

Indoor Air Quality: World Asthma Day is this month. Be sure to capitalize with press releases and publicity by offering free IAQ testing, analysis and service discounts or bundles to showcase your expertise. Offer promotions on filtration, purification, dehumidification, and air exchange products as well as duct cleaning, sanitizing, and sealing. All departments should be pushing for IAQ leads. Send postcards and direct mail offers. Newspaper, free-standing inserts, and coupon mailers (Val-Pak, ADVO, Super Coups, Clipper Magazine, Shoppers Guide or Penny Saver) can drive leads as well. Offer video duct inspections. Leverage replacement leads for duct cleaning and other via letters or NP ads. Promote an energy analysis and IAQ check.

Plumbing: 5 of the top 10 most preventable homeowner insurance claims are plumbing related. Make homeowners aware that burst washing machine hoses, shower leaks, water heater leaks, etc. are not the sort of thing they want happening while on vacation. Offer things to help "waterproof" their home, which turns performance maintenance into a

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goldmine. Make a push to have techs promote maintenance agreements when in the home. Run a tankless water heater promotional campaign. Run a letter to make your services and benefits stand out from the competition and educate customers of your range of services and provide a \$20-50 coupon.

Electrical: Arc Fault Breakers have been recently added to the Electrical Code in many states. Most people don't know about them. That's where you come in. This breaker can detect arcs and trip automatically to prevent home fires and will offer peace of mind and security to many. Continue to target pool owners and dimming lights. Use a letter to promote landscape lighting.

Other: Allergists' offices are overflowing with patients and your information should be there. Make contacts NOW!!!

MEDIA MODALITIES:

Newspaper and Magazines: Plumbing service presence should increase while HVAC should be reducing service offering in newspaper. Concentrate more on replacements. Use your sharpest direct response ads now to get leads that your competition is waiting on. No waiting. Be aggressive. TOMA ads continue.

Newsletters: Work any leads generated from previously mailed/emailed newsletter.

Direct Mail letters: Target your mailings for direct response replacement offers. Use names from April's tune-up and performance maintenance campaigns. Use deferred payment programs, monthly payments, or trade-in campaigns now. It's not too late to continue mailing for tune-ups.

Postcards: The very last of your direct response service postcards for tune-ups and performance maintenance should be out. *Service Postcard* - A direct response piece triggering service needs, dated deadline, with a discount for bundled services. Aim for 68% to convert to a higher \$ sale or Agreement sale. End of month may be good for your branding postcards for replacements. *Summer Postcard* - These are the warm season equivalent of a Holiday Card. Merely a reminder of who you are without a sales pitch. Follow-up irrigation system, pool, spa, plumbing upgrade letters with reminder postcards; these should hit before the weather heats up.

Market Saturation and Domination: Radius mailers around all homes served continue. Thank you for your business random calls and personal notes letters/cards/emails and gifts. Referral request letters and thank you cards/letters and rewards. Pick your top 5-10 zip codes you want to target for the year and have rotating branding and direct response offers that roll through the zip codes at least 6 times a year in addition to getting your company newsletter.

Radio/TV/OTT/VOD: Radio, TV, and OTT can increase from the Spring lull to include your pre-season offers that are also in print. Remember, your company name and URL should be branded at least twice in all broadcast strategies.

Referrals, Employee-Generated, Self-Generated: Work referrals now. Why? More warm weather needs equal more leads from customer's network! Ask every single prospect for 2-3 names. Give them (or send) a \$20 coupon on the spot for future service as your thanks. Tell them to put it on the 'fridge. If their referral converts to a customer immediately acknowledge it and send referral rewards.

Phone Greeting: Change the way call-takers answer the phone and include a holiday or special event greetings for May Day; Cinco de Mayo; Kentucky Derby; Mother's Day; Armed Forces Day; Preakness; Stepmother's Day; Indianapolis 500; Memorial Day; World Asthma Day; Nurse's week and month; Teacher's Day; National Police week; Peace Officer's Appreciation Day; Military Appreciation Month from Company Name. Be consistent or you'll sound unprofessional. Inform callers about your current promotions as these are probably some of the best incentives you have all year.

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On-Hold Messages: Move messages over to Spring and warm weather replacement sales. Messages can also reflect holidays and special events.

Yellow Pages: Costly yet still effective for the older generation. You deserve results. Have an ad designed that performs and generates leads.

Alternative Media: Your yard sign presence should never be taken for granted. Do not forget these on every lengthy service visit or install. Your name should be pounded into your market.

Billboard: In warmer climates, launch a creative spring performance maintenance campaign or promote your availability to serve fast and around the clock. Maintain It or Pay \$\$\$ to Fix It – Your Choice! We Never Close; We're Up Late – Call Us!; Here When You Need Us; Merchants of Cool. No pictures of equipment PLEASE!

Website/Email/Text/Retargeting banner ads: Create awareness of all other media offers small and large; Pick or create a holiday and celebrate it with a greeting and imagery; performance maintenance and filter change reminder postcards, calls, and emails. Send an electronic version of your newsletter and have available for download on website. Make sure your emails to non-closed quotes go out. Appointment confirmation emails/texts/calls continue. Post an Indoor Air Quality report for download and share with all scheduled visit confirmation emails/text. Send helpful co-worker bios, what to expect, and links to PDF downloads, videos, and 3rd party resources. Promote energy saving offers for summer.

SEO and PPC: A: Test the "image extensions" on PPC. This is a new feature worth testing with things like pictures of the owner (and his/her family), team photos, vans, etc. Even if a potential customer doesn't click on this, they see your brand/likeness, etc...as is a nice tool to connect the dots or make an impression.

B: Now is a good time to run an SEO/PPC keyword conversion comparison analysis as you prep for the change in season. Where are you strongest in ranking and conversions for SEO? Are you using PPC to "prop up" those areas for SEO in which you are weakest? Use Google Trends to test various keyword strings against each (e.g., Replace furnace, new furnace, upgrade furnace, install furnace, etc. and test cooling, AC, air conditioning, air conditioner in warmer markets). SEO & PPC will never make your brand a household name – Roy Williams, Wizard of ads

Social Media and Reviews: Interact with reviews and social media posts about your company. Participate in community pages with homeowner and seasonal tips. Tell stories and share pictures (with permission) of customer situations, how you helped, and their testimonial. Share memes and inspirational messages. Keep it informational and educational and have some fun. Watch the humor – this can be sticky without context. Watch your investment of time and energy even though these can be low-dollar vehicles. Make sure the juice is worth the squeeze as you can never generate more time and energy. The key is throughput.

Online Coupon Sites: Living Social and Groupon can generate calls for discounted services if you are slow. Be creative and train techs to leverage opportunities for bundled services, add-on sales, and service agreement conversions. Promote monster maintenance, indoor air quality, plumbing and electrical services. Avoid product promotion as it tends not to generate as high a level of interest and is harder to parlay into an expanded scope of work once in home. This is a great venue to promote your game-changing performance maintenance regularly \$199, now just \$97 or launch your Monster Maintenance regularly \$897, now just \$379.

Google and YouTube: While Google and YouTube are the number one and two search engines, make sure your you claim all search engine listings and that your company data is accurate and consistent. Check Google My Business (GMB) listing. Review annually. Apply for Google Guaranteed (GG). Google Local Services Ads (GLSA) increased their "max bids" per lead from \$63/bid to \$1000/bid, which will add more confusion to an already difficult to predict pay per lead mechanism. Work with your digital directors on handling accordingly. Consider your cost per lead now and put a cap on your upper limit. Most leads come in well under whatever you set as your maximum bid, so LSA leads are still 50% cheaper (or more) than PPC. Google knows its value and it's only a matter of time before they leverage that. Run videos

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on pre-season maintenance, filter changes, air cleaner cleaning, and other helpful tips related to the services you offer. You want be educational without being overly promotional. Provide tangible tips and offer your services as support or a turnkey done-for-you solution for those without time, tools, or skills.

Online Leads Aggregators, Big Box Retailers, and Home Warranty Company partnerships: These companies are your competitors. I recommend against partnering with them since we don't want to build our competitor's brand with our resources or reinforce with consumers that this is a good way to buy. These companies are a disservice to customers getting the best overall experience (and often come at a premium since providers rightfully add in the 3rd party fees). If you choose to participate, set it up as a separate profit center on your financials so you can price properly. I recommend taking out all replacement department overhead costs so your prices can be lean to generate the highest revenue return for the efforts invested in low-probability prospects. It makes no sense to participate in the hysterical hyperactivity these sources create if you cannot get a return on your energy.

Homeowner Associations Affiliations: Offer to host open houses where you serve refreshments and make a seasonal presentation that's about education and not promotion. Certainly, you have a well-timed community-exclusive promotion available for those that want to act. Do these 2-4 times a year.

Other Affiliations: Home Realtors, Home Inspectors, Other Trade Companies, Corporate Employee-Benefit programs, Landlords/Property Managers, etc. You may want to create separate profit divisions depending on how you choose to assign overhead and price.

Publicity, Public Relations, Press Releases, and Media Coverage: Link your efforts to community and social conscience with charitable organization support or by helping area homeowners that are struggling or down on their luck. The limelight will build awareness, credibility, and good thoughts for your reputation. The payoff is more calls, more sales, larger tickets, more referrals, quicker sales cycle. You can partner with local radio, TV and newspaper by meeting with their staff and asking them to promote. They always like feel good stories and will make FREE public service announcements if they feel you are genuine in serving the community versus being a gimmick.

Internal and Operational: Logo/Brand: Is it time to refresh? Unique and creative design and colors; Create a distinctive look with your uniforms; Make sure your uniforms are clean, sized properly, pressed with no stains or tears. Vehicles: Make sure they are clean, organized, and free of clutter – these are your rolling billboards. Is it time to upgrade, have damage repaired, freshen up the graphic wrap? Business cards for every co-worker with referral request. Acquisition strategy should be ongoing. Review and refresh processes annually or as needed. Training and coaching on communication and customer experience beyond operational experience. Hand out flyers with product/service specials or current replacement promotion. Thank you letters from the owner, personalized thank cards from the techs or salespeople, thank you texts and emails from the staff, thank you gifts (at least for installs and large ticket services). Review and referral requests and thank you letters and gifts when generated.

Opportunity Maximization: Happy checks on all customers continue. Outbound calling, emailing, texting, and postcards to your customers with reminders to change filters, flush water heaters, clean gutters, performance maintenance, and other seasonal tips. Salespeople or your inside sales team can make outbound calls to your customers with product and service offers, follow-up behind direct mail campaigns, tech recs and service agreements not purchased, agreement customers that need to have their performance maintenance completed, age/condition/repair cost opportunities that meet the 4K Rule or other replacement consideration criteria, rehash open quotes from salespeople or selling techs with compelling offers to close and re-rehash every 90 days, buy back repairs and offer to match cost toward replacement.

Charitable Causes, Community, Events, Contributions, and Sponsorships: Sponsor local events, causes, and teams and have your name mentioned as much as possible in conjunction. People will hear your name and later recall it (but not know how or why) when the need arises. Use job signs on all install, IAQ, plumbing, and HVAC service calls. Be sure to leave a business card with your tip every time you eat out. Hand out cards at every meeting or trade show you attend and leave a few extra at a central gathering spot, tables, and bar. Include business cards with every invoice and statement you

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send. Hand them out to other trade professionals. Have commercial accounts include your business cards in their employees pay for \$10 off their next service visit.

Buzz: Create it around your brand, in your culture, with your people and for your customers.

Holidays and Special Events: Consult these websites (www.holidayinsights.com; www.checkiday.com; www.calendarpedia.com; www.daysoftheyear.com) for specific days you choose to celebrate internally with your team or externally with your customers. Make it engaging, fun, and memorable with signage, costumes, giveaways, events, fliers, emails, truck and building decorations. Daylight Savings Time is 3/13/22. Remind your customers online, on the phone, and in the home in a whimsical way. Don't forget Receptionist Day and Employee Health and Fitness Day.

Month Long Celebrations

- Asian American Month
- Date Your Mate Month
- Foster Care Month
- [Gifts from the Garden Month](#)
- Lupus Awareness Month
- Mystery Month
- National Barbecue Month
- National Bike Month
- National Blood Pressure Month
- National Hamburger Month
- National Photograph Month
- National Recommitment Month
- National Salad Month
- Older Americans Month
- Pacific Islander Heritage Month

Weekly Celebrations

- Be Kind to Animals Week -First full week of month
- Nurse's Week - first full week of month
- Wildflower Week - week two
- National Bike Week - third week
- National Police Week - third week of month
- Emergency Medical Services Week - fourth week of month

May, 2023 Daily Holidays, Special and Wacky Days:

May 1

[Hawaiian Lei Day](#)

[Loyalty Day](#)

[May Day](#)

[Mother Goose Day](#)

[Save the Rhino Day](#)

May 2

[Baby Day](#)

[Brothers and Sisters Day](#)

May 3

[Bike to School Day](#) - First Wednesday in May

[Garden Meditation Day](#)

[Lumpy Rug Day](#)

[World Press Freedom Day](#)

May 4

[Bird Day](#)

[National Candied Orange Peel Day](#)

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[Renewal Day](#)
[Star Wars Day](#)

May 5

[Cartoonist Day](#)
[Cinco de Mayo](#)
[International Tuba Day](#) - first Friday in May
[National Hoagie Day](#)
[Oyster Day](#)
[Space Day](#) - first Friday in May

May 6

[Beverage Day](#)
[Free Comic Book Day](#) - first Saturday in May
[Herb Day](#) - first Saturday in May
[Kentucky Derby Day](#) - first Saturday in May
[National Fitness Day](#) - first Saturday in May
[National Tourist Appreciation Day](#)
[National Nurses Day](#)
[No Diet Day](#)

May 7

[National Day of Prayer](#)
[National Tourism Day](#)

May 8

[Iris Day](#)
[National Outdoor Intercourse Day](#)
[No Socks Day](#)
[V-E Day](#)
[World Red Cross Day / World Red Crescent Day](#)

May 9

[Lost Sock Memorial Day](#)
[National Teacher's Day](#) - Tuesday of first full week of May

May 10

[Clean up Your Room Day](#)
[National Receptionist Day](#) the second Wednesday in May
[School Nurses Day](#) the Wednesday during Nurse's Week

May 11

[Eat What You Want Day](#)
[Twilight Zone Day](#)

May 12

[Child Care Provider Day or Daycare Provider Day](#) - Friday before Mother's Day
[Fatigue Syndrome Day](#)
[International Nurses Day](#)
[Limerick Day](#)
[Military Spouses Day](#) the Friday before Mother's Day

May 13

[Birth Mother's Day](#) - Saturday before Mother's Day
[Frog Jumping Day](#)
[International Hummus Day](#)
[International Migratory Bird Day](#) the second Saturday in May
[Leprechaun Day](#)
[National Babysitters Day](#) - Saturday before Mother's Day

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[National Windmill Day](#) - the second Saturday in May

[National Train Day](#) - Saturday closest to May 10th

May 14

[Dance Like a Chicken Day](#)

[Lilac Sunday](#) second Sunday in May

[Mother's Day](#) second Sunday in May

May 15

[National Chocolate Chip Day](#)

[National Slider Day](#)

[Police Officer's Memorial Day](#)

May 16

[Love a Tree Day](#)

[National Sea Monkey Day](#)

[Wear Purple for Peace Day](#)

May 17

[Pack Rat Day](#)

May 18

[International Museum Day](#)

[No Dirty Dishes Day](#)

[Visit Your Relatives Day](#)

May 19

[Boy's Club Day](#)

[National Bike to Work Day](#) - third Friday of month

[National Endangered Species Day](#) - third Friday in May

[World Plant a Vegetable Garden Day](#)

May 20

[Armed Forces Day](#) - third Saturday of month

[Be a Millionaire Day](#) - now we all can go for that

[Pick Strawberries Day](#)

May 21

[National Memo Day](#)

[National Waiters and Waitresses Day](#)

May 22

[Buy a Musical Instrument Day](#)

[National Maritime Day](#)

[Victoria Day\(Canada\)](#) - Monday preceding the 25th

[World Goth Day](#)

May 23

[Lucky Penny Day](#)

[World Turtle Day](#)

May 24

[International Tiara Day](#)

[National Escargot Day](#)

May 25

[National Missing Children's Day](#)

[National Brown Bag It Day](#)

[National Towel Day](#) - in the UK

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[National Wine Day](#)
[Tap Dance Day](#)

May 26

[Don't Fry Friday](#) - Friday before Memorial Day
[Sally Ride Day](#)

May 27

[International Jazz Day](#) - Saturday of Memorial Day weekend.
[Sun Screen Day](#)

May 28

[Amnesty International Day](#)
[National Hamburger Day](#)

May 29

[Learn About Composting Day](#)
[Memorial Day](#) last Monday of month

May 30

[Mint Julep Day](#)
[Water a Flower Day](#)

May 31

[National Macaroon Day](#)
[Save Your Hearing Day](#)
[World No Tobacco Day](#)
[World Otter Day](#) - Last Wednesday in May