Roofing Co. Leverages M|A|S
to Generate Leads from Current Customers

Background :

Roofing Co. was started 30 years ago and has grown to service a larger portion of the greater Midwest. In the past, their client base has grown substantially through word of mouth and traditional advertising tactics. However, due to increasing competition and an economic downturn, growth was stagnant over the past few years.
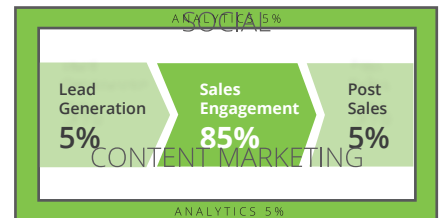
Like a lot of companies, Roofing Co. lost track of its customers and failed to communicate beyond the initial sale. This is due to a combination of the limited marketing resources, and a primary focus on generating new customers instead of engaging with old ones. With a customer base over 20,000, Roofing Co. believes that they could boost sales by reengaging past customers to cross-sell them on maintenance work and other services.

Industry:
Construction

B2B/B2C/Channel:
B2B/B2C, low volume,high RPU with cross sale potential

SOCIAL
ANALYTICS 5%

Lead Generation	Sales Engagement	Post Sales
5%	85%	5%

CONTENT MARKETING
ANALYTICS 5%

Gross Revenues: $4.42ᴍᴍ   Units Sold/Month: 48   Revenue/Unit: $9,200   New Leads/Month: 500

Goal/ Challenge:

Roofing Co. implemented marketing automation to accomplish the following goals:
1. Increase sales of roofing maintenance programs to existing customers.
2. Cross-selling existing customers additional services such as:
   a. Scheduling routine (annual or semi-annual) inspections with existing customers and providing comprehensive maintenance evaluations.
   b. Gutter repairs, cleaning and replacement
   c. Skylight or solar tube installation
   d. General repair work or repairs after storms
3. Encourage customers with old roofs that now is the time to upgrade to a new roof

Tactical Philosophy:

Roofing Co. and their marketing agency believed that they could identify segments of their customer base that are more likely to buy specific services. They agreed that regular, targeted communication with each customer segment will likely lead to the most conversions and highest revenue. The agency suggested using marketing automation for its ability to dynamically segment customers easily, and to automatically notify the sales team when a lead appears to be ready to buy. The agency employed M|A|S's marketing automa-tion platform, and built out several workflows based on the segments they identified.

Recommended Tactics:

1. **Segmentation Using Dynamis Lists**- Roofing Co. used M|A|S's Dynamic Lists to identify and segment their extensive customer base into distinct groups, based on:
   a. Consumer or business
   b. Age of roof
   c. Type of roof installed

In doing so, Roofing Co. identified groups that were more likely to buy specific services that they offer, and targeted each of these groups with individual, personalized communication to provide the best chance of conversion

B2B, Estimated Customers Per Segment			
1 Year, Metal (0)	1-10 Years, Metal (800)	10-20 Years, Metal (1500)	20+ Years Metal (200)
1 Year, Asphalt (600)	1-10 Years, Asphalt (920)	10-20 Years, Asphalt (1900)	20+ Years, Asphalt (1180)
1 Year, Tile (380)	1-10 Years, Tile (230)	10-20 Years, Tile (170)	20+ Years, Tile (20)
1 Year, Slate (570)	1-10 Years, Slate (0)	10-20 Years, Slate (400)	20+ Years, Slate (330)
1 Year, Synthetic (150)	1-10 Years, Synthetic (440)	10-20 Years, Synthetic (25)	20+ Years, Synthetic (165)

B2C, Estimated Customers Per Segment			
1 Year, Metal (560)	1-10 Years, Metal (570)	10-20 Years, Metal (520)	20+ Years Metal (150)
1 Year, Asphalt (2590)	1-10 Years, Asphalt (3450)	10-20 Years, Asphalt (1275)	20+ Years, Asphalt (185)
1 Year, Tile (120)	1-10 Years, Tile (330)	10-20 Years, Tile (40)	20+ Years, Tile (160)
1 Year, Slate (350)	1-10 Years, Slate (330)	10-20 Years, Slate (200)	20+ Years, Slate (320)
1 Year, Synthetic (100)	1-10 Years, Synthetic (125)	10-20 Years, Synthetic (125)	20+ Years, Synthetic (75)

Once set up, these Dynamic Lists automatically sort customers and add/remove them from segments as needs change, creating a permanent growth engine for Roofing Co.

2. **Targeted Marketing Communication Drip Campaigns**- Once Roofing Co. identified these distinct groups they created email "drip campaigns" that regularly communicated about the products and services that met the segments exact needs. For example:

   a. For businesses with asphalt roofs older than 20 years, the drip campaign encouraged them to consider a new roof, citing statistics on the energy savings of new roofing materials, offering a free estimate, and information on various government rebate programs.
   b. For a customer that purchased a roof more recently, Roofing Co. targeted them with messaging about how regular maintenance programs could extend the life of a roof by many years and prevent leaks and other costly problems.

3. **Proactive Sales Engagement with Lead Scoring and Notifications -** Roofing Co. used M|A|S's lead tracking, lead scoring, and notification features to identify and notify the sales team about leads that exhibited signs that they were more open to a purchase. For example:

   a. When a lead with an old shingle roof opened an email and clicked back to the website to read an article on the energy saving gained by installing a metal roof, the sales team was automatically notified. The sales team called the lead the next day armed with the information that they were considering a metal roof, and that "energy savings" appeared to a be a hot button issue for them when deciding to purchase.

   b. When another lead who recently purchased a new roof clicked to the website to read an email about the federal rebate programs on solar panel installation, the sales team was notified to call the lead, and an additional email specifically speaking about the benefits of solar energy was sent to the lead auto-matically.

   Roofing Co. identified dozens of these automation and communication opportunities and in doing so, allowed the sales team to focus on the few hundred customers (out of the 20,000) that were truly interested one or more of the products and services that Roofing Co. offered.

4. **Specialized Campaigns to Target Consumers –**Roofing Co. determined a few of the top reasons other than life of the roof that customers would need repairs or replacement. They created specialized campaigns in M|A|S and built out workflows that sent targeted content to customers when the campaign launched. For example:

   a. Prior to storm season, Roofing Co. built out a workflow that ran for 2 months targeting users based on their segmentation. For customers that had purchased any roof type between 2-10 years ago, they sent out information on quick repairs that could prevent costly damage when storms hit. For business that had their roof for less than 1 year, they provided information about their maintenance plan that

covered repairs of small damages caused by storms. After storm season, they used rules-based auto-mation to determine the users that did not opt in to storm coverage, and automatically send them emails offering repair services.

b. Energy companies in Missouri increased their rates, and Roofing Co. wanted to offer free estimates to costumers with asphalt roofs that are older than 10 years, to try to sell them a new and more energy efficient roof. They created a drip campaign that ran for 6 months following the announcement that provided statistics on the benefits of a new roof, testimonials from customers with energy efficient roofs on the savings they have seen since they got their new roof, and data on the tax breaks they can receive from going to a green roofing option.

In the future...

Roofing Co. plans to use M|A|S to not only engage previous customers, but to reach out to a new customer base through lead generation techniques and automating social media.

The results that Roofing Co. can achieve using M|A|S are not possible with traditional ESPs and a basic CRM system. Integrating all of their marketing efforts into a single marketing automation platform allows them to have near one-on-one communication with their customers in a high-converting process. The end-to-end tracking ability allows Roofing Co. to see the ROI of each of their efforts, allowing them to effectively allocate resources to the highest performing.

Customer Segment	Tactic	Effort	Sales	Revenue
All Segments	**Lead Scoring -** Helped Roofing Co.'s sales team identify hot leads that were ready to purchase a roof, and colder leads that need to be nurtured for reengagement, based on the customer's interactions with website and marketing content.	15 minutes to set up and 1 hour to consider the criteria	**Supports Other Tactics**	
All Segments	**Sales Team Notifications and Alerts -** Send text messages/ emails to sales team to notify when an old customer came back to the website to look for more information, that way they could reach out with targeted content.	10 minutes to set up		
All Segments	**Specialized Campaigns -** Roofing Co. created a specialized campaign to upsell the maintenance plan to segmented customers prior to storm season, and repairs after for those that did not opt in to the plan.	30 minutes for set up, in addition to time for content creation	7,500 emails send over to the course of the campaign to 5,000 customers. This lead to 150 leads opting into the maintenance plan, and 22 leads scheduling maintenance after a storm.	$238,000
All Segments	**Analytics** were implemented to trach the ROI on each campaign run, to determine the most effective methods of marketing and focus efforts on these.	10 minutes to set up campaign	Due to realizing that they were innefficiently spending thousands of dollars on direct mail, they were able to reallocate funds into paid search, which generated an additional 10 leads per month and 1 roof sold.	$9,200
Segmented Drip Campaigns: Key Segments were chosen by Roofing Co. to begin targeting with highly relevant campaigns. Once the segments were set up, Dynamic List automatically update customers as their needs change, becoming a permanent growth engine for Roofing Co.				
Segment: Business' Asphalt Roof, 10-20 years	Shingle replacement and repair campaign	5 minutes to set up 2 hours for content creation	1,900 customers in this segment were sent emails, which generated 30 leads and 17 repair jobs.	$68,000
Segment: Customer Metal Roof, 20+ years	Upgrade to new roof campaign	5 minutes to set up 3.5hours for content creation	150 customers in this target were sent 3 emails each. Of those, 5 turned into leads, and two upgraded to a new roof.	$18,400
Segment: Business Synthetic Roof, over 10 years	Send out 50% discounted evaluation offers to determine preventative maintenance work and minor repairs	5 minutes to set up 1.5hours for content creation creation	190 customers were sent 2 emails over the course of 2 weeks. 25 scheduled evaluations, 13 requested ma-intenance work.	$52,625
Segment: Customer All Roof Types, 1-10 years	Fall Campaign to increase signups for roof and gutter cleaning	10 minutes to set up campaign, 5 minutes to set up workflow, 4 hours for content creation	There were 2,390 in the customers that received emails, resulting in 120 roof and gutter cleaning appointments.	$1,200
Segment: Customer, Tile and Slate Roof, 1 year own	Campaign to upsell solar tubes or skylight installation, offering a 25% discount since they recently had a new roof done by Roofing Co.	5 minutes to set up campaign, 2.5 hours content creation	Of the 660 customers receiving an email offering the discount, 19 became leads and 15 purchased solar tubes or skylight installation.	$30,000
Segment: Business Asphalt and Synthetic Roof, 20+ years	Summer campaign that promotes the energy efficiency that comes with a new roof	5 minutes to set up campaign, 5 hours content creation	Of the 1345 customers in these segments, all rec-eived 4 emails. This resulted in 9 leads with 7 new roofs.	$64,400
Segment: Customer, Customer, All Roof Types, 10-20 years	Winter campaign that promotes energy efficiency that comes with repairing problems with their current roof.	5 minutes to set up campaign, 4.5 hours content creation	Of the 2,160 customers, all received 3 emails. This resulted in 39 leads, with 27 repair jobs.	$108,000
			Net Impact	Revenues increased **$589,825,** a **13%** lift due to marketing automation