



SERVICE DIRECT

Marketplace

Setting Yourself Up For Success

In this guide we'll help you get the most out of the Service Direct Marketplace program and highlight what it can do for you.

By optimizing your Account and following these best practices, you will get more Leads, win more clients and see your return on investment.

What to Expect

Service Direct Marketplace connects service businesses with New Potential Customers in real-time. Leveraging our proprietary pay per call platform, Marketplace offers a flexible, low-risk, and cost-effective way to generate quality, exclusive Leads in your area.

Keep in mind that not every Lead is a Billable Lead, and not every Billable Lead will turn into a Booked Appointment. Your performance results will vary based on the services your offer, your ability to consistently answer the phone and turn a Potential Customer into an actual customer, as well as the level of competition in your local Service Area.

UNDERSTANDING BILLABLE VS. NON-BILLABLE LEADS

A Billable Lead is a Phone Call Lead or Form Lead generated by a Service Direct Campaign that is a New Potential Customer.

A New Potential Customer is someone in your Service Area who is seeking services that typically align with your Service Category.

A Non-Billable Lead is a Phone Call Lead or Form Lead generated by a Service Direct Campaign that is not a New Potential Customer. Examples of Non-Billable Leads are existing customers, job seekers, people outside your Service Area, solicitors, people seeking services not normally offered by your industry, etc.

50-60%

Approximately 50% to 60% of Billable Leads turn into Booked Appointments, depending on the Service Category.

Learn More: [Billable and Non-Billable Leads](#)

The mySD Platform enables you to manage your Campaigns and see your Leads in real-time.

		9:47 am 03/19/19	Booked Appt. Job Won	Marketplace - HVAC	Stevie Ray Vaughan	(512) 456 6677	2:32	\$105.00	\$875.00
--	--	---------------------	-------------------------	--------------------	--------------------	----------------	------	----------	----------

Listen to Call *Last played 11/02/20 2:32pm by leader@customeremail.com*

1:19 / 2:32

FOLLOW-UP STARRED

Lead Progress and Revenue

Managing Progress helps us optimize your Campaigns and adding Revenue helps show your ROI.

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Call Answered	Booked Appointment	Job Won	Revenue	
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="\$875.00"/>	<input type="button" value="SAVED"/>

Lead Status
Billable

QUALITY CHECK

Lead Review
[Submit for Review](#)

Lead History

Add Note

Quality Check Performed: This Lead was automatically reviewed by our system.

06/25/19 11:28 by Service Direct Quality Check

Lead opened for the first time.

06/25/19 11:28 by leader@customeremail.com

		2:15 pm 03/18/19	Unmanaged	Marketplace - Plumbing	Form Filla Jr.	nicecustomer@email.com (512) 123 4567	--	\$84.00	--
		1:43 pm 03/18/19	Booked Appt. Job Won	Marketplace - Plumbing	Mick Jagger	(512) 887 3467	2:17	\$84.00	\$465.00
		8:22 am 03/18/19	Job Won Reviewed Billable	Marketplace - HVAC	Tom Petty	(512) 123 3467	12:18	\$105.00	\$1,700.00
		5:04 am							

Quick Tips for Success

RESPONSIVENESS IS CRITICAL

The ability to answer the phone or respond to Form Leads quickly is critical to success. When it comes to missed calls, 80% of callers will not leave a message, and 85% of unanswered calls never call back. Prepare your team to respond to missed Leads promptly.

TRACK LEAD PROGRESS

Track Lead Progress for Billable Leads in the [mySD Lead Manager](#) to see your Lead Performance Metrics and to improve our ability to optimize your Campaigns for quality Leads.

DON'T PAUSE AND ENABLE YOUR CAMPAIGNS TOO FREQUENTLY

Sometimes it makes sense to Pause your Campaigns but doing so too frequently will negatively impact the performance of your Campaigns. If you do Pause a Campaign, then be sure to set Enable For Future Date.

Learn More: [Controlling Lead Volume](#)

REVIEW YOUR CAMPAIGN SETTINGS

Customize the settings for each of your Campaigns based on your business needs. Your [Campaign Settings](#) directly impact the volume of Leads you receive, the time of day when you receive them, and where the Leads will be delivered (i.e. the person responsible for answering the phone and/or checking emails).

MONITOR PERFORMANCE AND ADJUST YOUR COST PER LEAD

The initial [Cost Per Lead](#) you set for each Campaign significantly impacts performance, and may need to be adjusted based on your Campaign's Service Category, Service Area and level of competition in your area. If you aren't receiving Leads within 7 Days, we recommend increasing your Cost Per Lead.

servicedirect Dashboard Leads Campaigns More [LOGOUT](#)

Welcome Awesome Company

5 Leads Marked for Follow-Up **845** Billable Leads All Time **224** Billable Leads Last 90 Days **568%** Managed ROI Last 90 Days **91%** Call Answered Rate Last 90 Days **67%** Job Won Rate Last 90 Days

Lead Manager Snapshot

Below are just your most recent Billable Leads. Go to your [Lead Manager](#) to see all your leads and filter them by type.

Date	Progress	Campaign	Name / Caller ID	Contact Details	Duration	Cost	Revenue
11:53 pm 03/19/20	Call Answered	Marketplace - HVAC	Aertha Franklin	(512) 123 4567	3:14	\$94.00	--
9:47 am 03/19/20	Booked Appt. Job Won	Marketplace - Plumbing	Stevie Ray Vaughan	(512) 456 6677	2:32	\$78.00	\$875.00
2:15 pm 03/18/20	Unassigned	Marketplace - HVAC	Fern Filo Jr.	nico.customer@email.com (512) 123 4567	--	\$94.00	--
1:43 pm 03/18/20	Booked Appt. Job Won	Marketplace - HVAC	Mick Jagger	(512) 987 3457	2:17	\$64.00	\$465.00
8:22 am 03/18/20	Job Won Received Billing	Marketplace - Plumbing	Tom Petty	(512) 123 3457	12:18	\$78.00	\$1,700.00
5:04 pm 03/17/20	Job Won	Marketplace - HVAC	Unknown Caller	(512) 713 3009	2:45	\$94.00	\$850.00
10:19 am 03/17/20	Booked Appt. Job Lost	Marketplace - HVAC	Maburna Guechi	(512) 988 0987	1:56	\$94.00	\$0.00
9:17 am 03/17/20	Unassigned Under Review	Marketplace - HVAC	Bizzie Smalls	thekingstny@brooklyn.com	--	\$94.00	--
3:07 pm 03/15/20	Booked Appt.	Marketplace - Plumbing	Nina Simone	(512) 321 0987	4:18	\$78.00	--
4:22 pm 03/14/20	Booked Appt. Job Won	Marketplace - HVAC	Chaka Khan	(512) 988 0987	5:26	\$94.00	\$235.00

Current Balance

CURRENT BILLING CYCLE

\$584 Current Balance

\$184 Lead Cost - \$44 Lead Credit = \$386 Unpaid Statement

BILLING THRESHOLD

\$198 / \$300

RECENT STATEMENTS

1988518 03/22/20 Card...1234 \$316 Unpaid Leads Generated (03/17/20 to 03/22/20) [PAY NOW](#)

1988457 03/16/20 Card...1234 \$100 Paid Leads Generated 03/10/20 to 03/16/20 [VIEW BILLING CENTER](#)

Campaigns Manager Snapshot

ENABLED CAMPAIGNS Ordered by Most Leads Last 30 Days

Marketplace - HVAC **29 Leads** Last 30 Days **\$94.00** Cost Per Lead [View in Campaigns Manager](#)

Marketplace - Plumbing **23 Leads** Last 30 Days **\$78.00** Cost Per Lead [View in Campaigns Manager](#)

Lead Manager

Filter Search Default View

Showing 1-25 of 74 Billable Leads from Last 30 Days

[View Performance](#) for these Leads

Tom Petty (512) 988 0987

Progress: Booked Appt., Job Won
Campaign: Different Business
Duration: 2:32
Cost: \$53.00
Revenue: \$1400.00

Listen to Call

1:54 / 2:32

Download Call

568%

Managed ROI Last 90 Days

78% Confidence

91%

Call Answered Rate Last 90 Days

86% Confidence

mySD Key Features and Benefits

MANAGING YOUR LEADS

Track Lead Progress

Review and manage your Leads in your mySD Lead Manager. You can mark a Lead with Call Answered, Booked Appointment, Job Won, and Revenue data. The more Leads you manage, the more accurate your Lead Performance Metrics will be and the better you can understand your Campaigns' ROI. Based on the performance data we can better optimize your Campaigns to generate more profitable Leads.

Learn More: [Managing Your Leads](#)

Lead Progress and Revenue ¹

Managing Progress helps us optimize your Campaigns and adding Revenue helps show your ROI.

✓

Call Answered

Yes
 No

✓

Booked Appointment

Yes
 No

✓

Job Won

Yes
 No

✓

Revenue

\$875.00

Lead History +

Note added: Appointment set for next week. Needs pricing for full AC install and replacement
06/25/19 11:28 by leader@customeremail.com

Lead opened for the first time.
06/25/19 11:28 by leader@customeremail.com

Submit Leads for Review

You should only pay for Lead from New Potential Customers and our Lead Review process ensures that you can dispute Leads you believe should be Non-Billable.

You are able to Submit A Lead for Review if...

- The call has been answered.
- The Lead was generated in the Last 7 Days.
- Call Recording was enabled at the time the Phone Lead was received.
- The Lead has not already been Submitted for Review.

Learn More: [Submitting a Lead for Review](#)

Learn More: [Billable vs Non-Billable Leads](#)

Call Insights Service

Enroll in our Call Insights Service and we will proactively review all your Leads to save you time and money and ensure you're seeing useful Lead Performance Metrics.

Learn More: [Call Insights Service](#)

Understanding Lead Performance Metrics

Gain valuable insights into your Campaign performance, Lead quality, and your return on marketing investment with Lead Performance Metrics. Lead Performance Metrics also influence the way we optimize your Campaigns. These additional data points help us focus on generating more of the types of Leads that are working for you.

Some key metrics you are able to see in real-time:

- Call Answer Rate
- Booked Appointment Rate
- Job Won Rate
- Revenue
- Return On Investment

Learn More: [Lead Performance Metrics](#)

Lead Performance Metrics for Current Filters ✕

Showing Metrics for 100 Billable Leads in Service Category Plumbing from Last 30 Days

Note: The more Leads you Manage, and the more completely you Manage them, the more accurate and useful your Performance Metrics become. Adjust your Lead Filters, such as date range, to see more broad or more granular Metrics.

Calls Answered

Good Confidence (84%)

Confidence based on 84 Leads with Calls Answered Managed out of the 100 Leads you are filtering by. ¹

66

Calls Answered

18

Calls Not Answered

89%

Call Answered Rate ¹

93

Likely Calls Answered ¹

Booked Appointments

Good Confidence (81%)

Confidence based on 81 Leads with Booked Appointments Managed out of the 100 Leads you are filtering by. ¹

58

Booked Appointments

23

Did Not Book

72%

Booked Appointment Rate ¹

64

Likely Booked Appointments ¹

Jobs Won

Good Confidence (90%)

Confidence Based on 90 Leads with Jobs Won Managed out of the 100 Leads you are filtering by. ¹

49

Jobs Won

41

No Job

54%

Jobs Won Rate ¹

52

Likely Total Jobs Won ¹

Revenue, Cost, Return On Investment

Good Confidence (88%)

Confidence Based on 88 Leads with Revenue Managed out of the 100 Leads you are filtering by. ¹

\$35,184

Revenue from 88 Leads with known Revenue

\$4,510

Cost from 88 Leads with known Revenue

680%

Your ROI from 88 Leads with known Revenue

\$30,674

Your Profit from 88 Leads with known Revenue ¹



482 Leads
Received All Time

146 Leads
Received Last 30 Days

129 Missed Opportunities
In the last 7 Days. [Want to win more Leads?](#)



Phone Leads [?]

[Edit](#)

\$82.00 Cost Per Lead



Form Leads [?]

[Edit](#)

Enabled 8 of 10 Service Subcategories



Service Area Zips [?]

[Edit](#)

92109, 91902, 91901, 92079, 92083, 92082, 91912, 91911, 91914, 92079, 92083, 92082, 91912, 91914, 92083, 92082, 91912, 91911, 91914, 92079, 92082, 92079, 92083, 92082, 91912, 92079, 92083, 91912...



Lead Delivery & Notifications [?]

[Edit](#)

Calls: (512) 124 4567

Email: clientperson@emailserver.com

Caller ID: Show SD Lead Caller ID Number (512) 877-3656

SMS: (512) 415 3506

MANAGING YOUR CAMPAIGNS

Each Campaign is created to generate quality, exclusive Leads for a specific Service Category in a specific Service Area. You can review and manage your Campaigns in mySD Campaigns Manager and below are some tips on what you can do to improve their performance.

Adjust Your Cost Per Lead

In general, raising your [Cost Per Lead](#) (CPL) will result in an increase of Leads while lowering it will decrease Lead Volume because CPL directly impacts our ability to compete for Leads. The CPL is managed on a per Campaign basis in mySD Campaigns Manager.

Adjust Lead Delivery Settings

Check that your Lead Delivery settings ensure that calls, emails, and text alerts are going to the right places.

Adjust Your Service Area

Your Campaigns Manager displays each of your Campaigns and you'll see a list of zip codes in their Service Area section. You can click on "Edit" to add or remove zip codes based on where you want Leads.

Adjust Campaign Status

Pausing your Campaigns too often can negatively impact Campaign performance. To [adjust Lead Volume](#), consider lowering your Cost Per Lead, or set a Campaign Schedule. If you do Pause Campaigns, then be sure to set Enable For Future Date.

Adjust Your Campaign Schedule

Most of our Clients choose to market their business 24/7, but you do have the flexibility to specify a Campaign Schedule to limit your advertising to specific times of day. Note that limiting advertising will also limit the amount of New Potential Customers you receive.

Learn More: [Using Campaigns Manager](#)

ACCOUNT SETTINGS

Add Additional mySD Users

You can add multiple Users to your Service Direct Account. We commonly see members add:

- Billing Users to help manage Billing activities.
- Marketing Users to help manage Lead Progress.
- All Users who will potentially respond to Leads.

Customize Notification Settings By User

Customize and set User-specific Notification permissions to make sure the right notifications are being delivered to the right people on your team.

Learn More: [Managing Users & Notifications](#)

WANT MORE LEADS?

If you want more Leads from the Marketplace program, consider the following:

- [Add Campaigns](#) in additional Service Categories or new Service Categories your company is offering.
- Expand the targeting for your Service Area.
- Increase the Cost Per Lead for your Campaigns to be more competitive in your area.
- [Check if you are eligible](#) for our Service Direct Select program and turbocharge your marketing efforts.

Learn More: [Growing Your Service Direct Account](#)

GETTING HELP

There are several ways to get help with your Service Direct Marketplace Account:

Help Chat

Click the chat bubble in the lower right corner of any page in mySD and the Help Chat Bot will guide you through a series of questions and answers. If the Help Bot cannot answer your question, you will be given the option to open a Support Request and a member of our Team will assist.

Help Center & Video Library

Our robust [Help Center](#) is available 24/7 and features tutorials, videos, best practices, and provides answers to most questions.

Email Support

Submit a [Support Ticket](#) in the Help Center or email us at support@servicedirect.com at any time.

Selected Videos

