



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

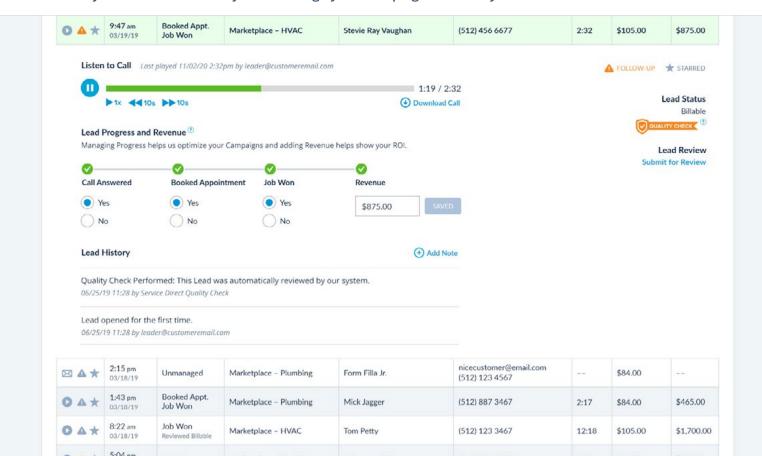
A Billable Lead is a Phone Call Lead or Form Lead generated by a Service Direct Campaign that is a New Potential Customer.

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.





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 <u>mySD Lead Manager</u> 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.

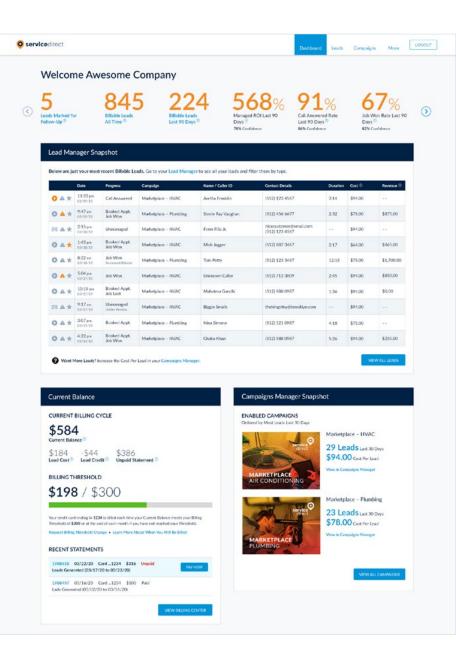
Learn More: Controlling Lead Volume

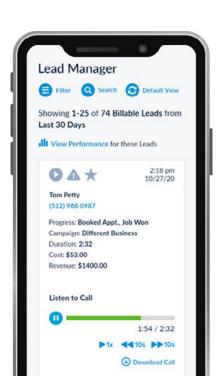
REVIEW YOUR CAMPAIGN SETTINGS

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 <u>Cost Per Lead</u> 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.





568%
Managed ROI Last 90
Days ®
78% Confidence

Last 90 Days

86% Confidence



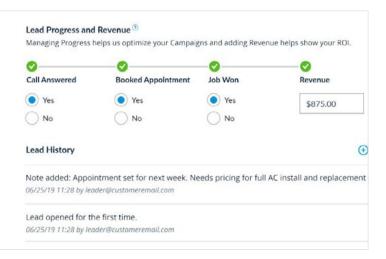
mySD Key Features and Benefits

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



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: <u>Submitting a Lead for Review</u> Learn More: <u>Billable vs Non-Billable Leads</u>

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

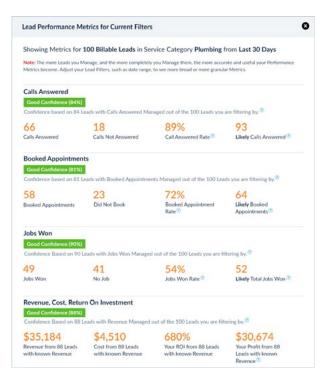
Understanding Lead Performance Metrics

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

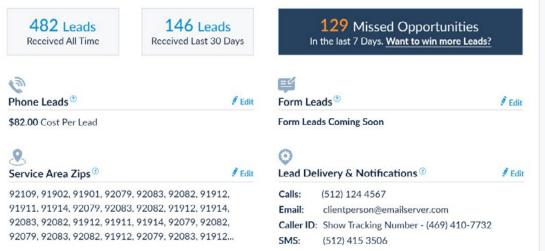
Learn More: Lead Performance Metrics











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 <u>Cost Per Lead</u> (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 <u>adjust Lead Volume</u>, consider lowering your Cost Per Lead, or try adding an Ad Schedule. If you do Pause Campaigns, then be sure to set Enable For Future Date.

Adjust Your Ad Schedule

Most of our Clients choose to market their business 24/7, but you do have the flexibility to specify an Ad Schedule. Note that limiting hours to receive calls 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.
- <u>Check if you are eligible</u> 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

Our robust <u>Help Center</u> is available 24/7 and features tutorials, best practices, and answers most questions.

Email Support

Submit a <u>Support Ticket</u> in the Help Center or email us at <u>support@servicedirect.com</u> at any time.

