



Setting Yourself Up For Success

Get the most out the Service Direct Select program by following these quick tips to help you turn more calls into customers.

At Service Direct, we value transparency and have worked diligently to build a lead management platform that puts you in control. By following these best practices to optimize your mySD Account, you will get more Leads, win more jobs and gain valuable insight into your return on investment.

  	9:47 am 03/19/19	Booked Appt. Job Won	Super Cool AC Campaign	Stevie Ray Vaughan	(512) 456 6677	2:32	\$105.00	\$875.00
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Listen to Call Last played 11/02/20 2:32pm by leader@customeremail.com

 FOLLOW-UP  STARRED



Lead Progress and Revenue ^(?)

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

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

What to Expect

Service Direct has been generating high quality, exclusive leads for local service businesses for over 15 years. In fact, we have delivered 2 Million+ Leads to 2,000+ home and professional service businesses across North America since 2006.

This means we have a lot of data and historical experience to be able to give you a good idea of the results you can expect from the program. Keeping in mind that not every Lead is a Billable Lead, and not every Billable Lead will turn into a Booked Appointment, here are some benchmark performance results by Service Category. These performance results will vary based on the services your offer, and the level of competition in your local Service Area.

40-80%

Approximately 40% to 80% of Billable Leads turn into Booked Appointments, depending on the Service Category.

5X-11X

Our clients typically see anywhere between a 500% to 1,100% return on their investment with our service.

A Billable Lead is a Phone 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 that is inquiring about one of the services that align with your Service Category.

A Non-Billable Lead is a Phone 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, someone outside your Service Area, solicitors, someone asking for a service your industry doesn't typically offer, etc.

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

Quick Tips for Success

RESPONSIVENESS IS CRITICAL

The ability to answer Phone Leads quickly and response 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. So, prepare your team to respond to missed Phone Call Leads or emails from Form Leads promptly.

TRACK LEAD PROGRESS

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

DON'T PAUSE AND ENABLE YOUR CAMPAIGNS TOO FREQUENTLY

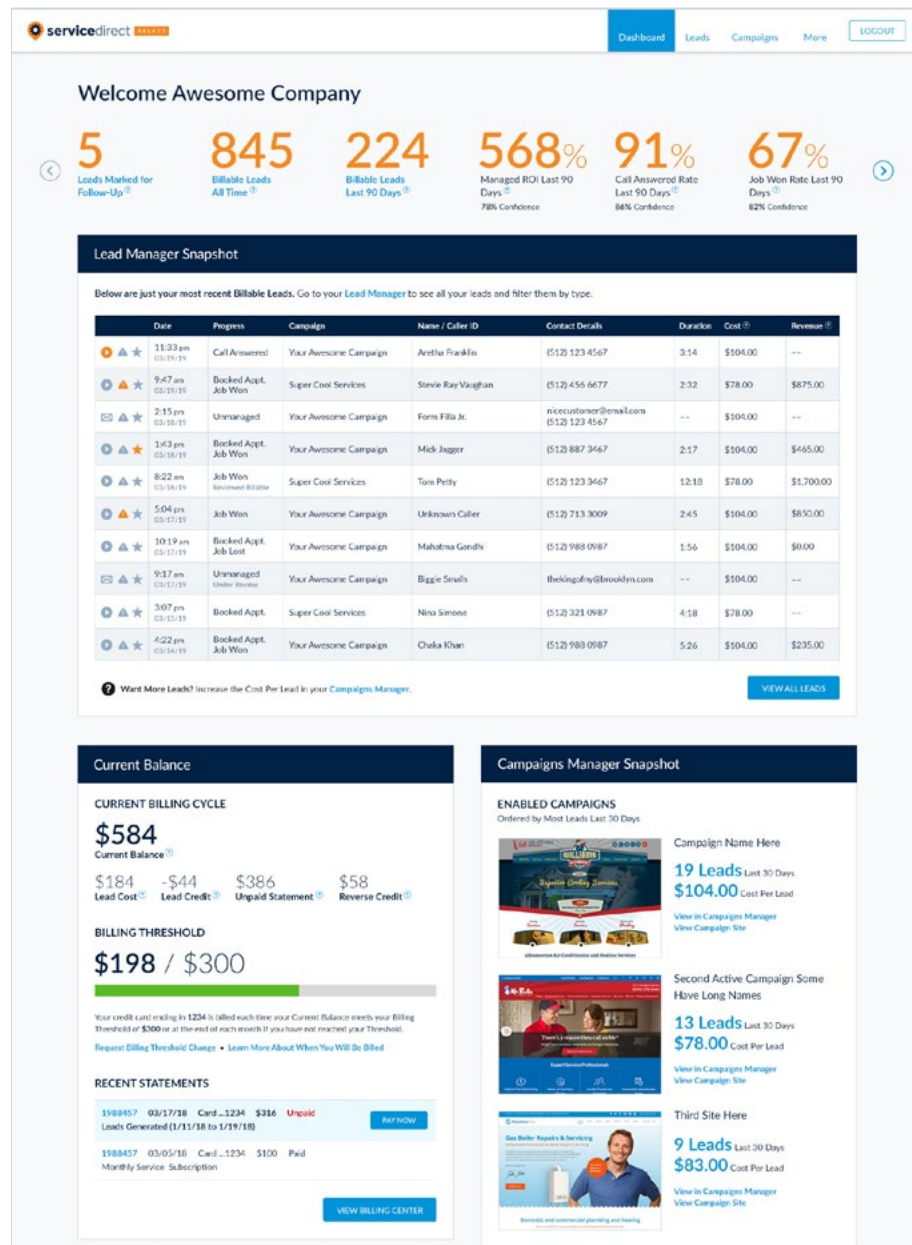
Sometimes it makes sense to Pause your Campaigns but doing so too frequently will negatively impact the performance of your Campaigns. If you do Pause a Campaign, then be sure to set Enable For Future Date.

CUSTOMIZE YOUR CAMPAIGN SETTINGS

If you are wanting to adjust the volume of Leads, consider changing your [Cost Per Lead](#) (higher CPLs result in more Leads, lower CPLs result in fewer Leads). If you want to adjust the hours you are receiving Leads, try adding an [Ad Schedule](#) so that your ads only run during your hours of operation.

GIVE IT SOME TIME

Give the program at least 3 months to ramp up to its full potential. Since each of your Campaigns are custom to your services and location, there is an optimization period and our team continually works to improve performance.



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 [?] 78% Confidence | 91% Call Answered Rate Last 90 Days [?] 86% Confidence | 67% Job Won Rate Last 90 Days [?] 82% Confidence

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 / Color ID	Contact Details	Duration	Cost [?]	Revenue [?]
11:33 am (3/19/19)	Call Answered	Your Awesome Campaign	Arelia Franklin	(512) 123 4567	3:14	\$104.00	---
9:47 am (3/19/19)	Booked Appt. Job Won	Super Cool Services	Stevie Ray Vaughan	(512) 456 6677	2:32	\$78.00	\$875.00
2:15 pm (3/19/19)	Unmanaged	Your Awesome Campaign	Form Fill Jr.	nicecustomer@email.com (512) 123 4567	---	\$104.00	---
1:43 pm (3/19/19)	Booked Appt. Job Won	Your Awesome Campaign	Mick Jagger	(512) 887 3467	2:17	\$104.00	\$465.00
8:22 am (3/19/19)	Job Won Referred by State	Super Cool Services	Tina Petty	(512) 123 3467	12:18	\$78.00	\$1,700.00
5:04 pm (3/17/19)	Job Won	Your Awesome Campaign	Unknown Caller	(512) 713 3009	2:45	\$104.00	\$830.00
10:19 pm (3/17/19)	Booked Appt. Job Lost	Your Awesome Campaign	Mahatma Gandhi	(512) 988 0987	1:56	\$104.00	\$0.00
9:17 am (3/15/19)	Unmanaged Under Review	Your Awesome Campaign	Biggie Smalls	thekingofjays@brooklyn.com	---	\$104.00	---
3:07 pm (3/15/19)	Booked Appt.	Super Cool Services	Nino Simone	(512) 321 0987	4:18	\$78.00	---
4:22 pm (3/14/19)	Booked Appt. Job Won	Your Awesome Campaign	Chaka Khan	(512) 988 0987	5:26	\$104.00	\$235.00

[?] Want More Leads? Increase the Cost Per Lead in your Campaigns Manager. [VIEW ALL LEADS](#)

Current Balance

CURRENT BILLING CYCLE

\$584
Current Balance [?]

\$184 Lead Cost [?] -\$44 Lead Credit [?] \$386 Unpaid Statement [?] \$58 Reverse Credit [?]

BILLING THRESHOLD

\$198 / \$300

Your credit card ending in 1234 is billed each time your Current Balance meets your Billing Threshold of \$300 or at the end of each month if you have not reached your Threshold.
[Request Billing Threshold Change](#) • [Learn More About When You Will Be Billed](#)

RECENT STATEMENTS

1/8/457 03/17/18 Card...1234 \$316 Unpaid [Pay Now](#)
Leads Generated (1/11/18 to 1/19/18)

1/8/457 03/05/16 Card...1234 \$100 Paid
Monthly Service Subscription

[VIEW BILLING CENTER](#)

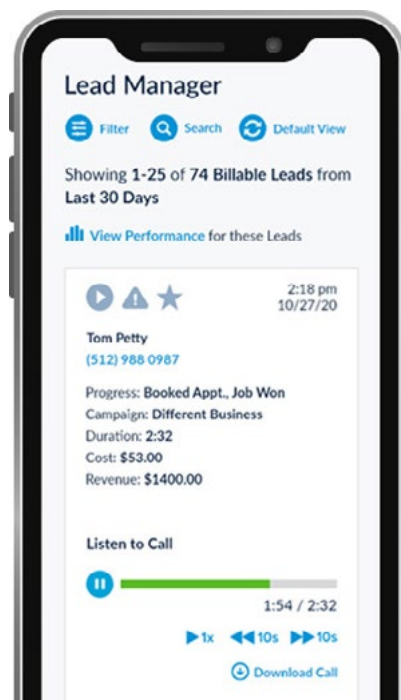
Campaigns Manager Snapshot

ENABLED CAMPAIGNS
Ordered by Most Leads Last 30 Days

Campaign Name Here
19 Leads Last 30 Days
\$104.00 Cost Per Lead
[View in Campaigns Manager](#)
[View Campaign Site](#)

Second Active Campaign Some Have Long Names
13 Leads Last 30 Days
\$78.00 Cost Per Lead
[View in Campaigns Manager](#)
[View Campaign Site](#)

Third Site Here
9 Leads Last 30 Days
\$83.00 Cost Per Lead
[View in Campaigns Manager](#)
[View Campaign Site](#)



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

1x 10s 10s

[Download Call](#)

568%

Managed ROI Last 90 Days [?]

78% Confidence

91%

Call Answered Rate Last 90 Days [?]

86% Confidence

Service Direct Best Practices

MANAGING YOUR LEADS

Track Lead Progress

Review and manage your Leads in your mySD Lead Manager. The more Leads you manage, the more accurate your Lead Performance Metrics will be. Based on the performance data we can better optimize your Campaigns to generate more profitable Leads.

Learn More: [Managing Your Leads](#)

Learn More: [Using the Lead Manager](#)

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 ²

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 only pay for Leads from new potential customers. Our Lead Review process ensures that you can flag 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 30 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: [Understanding Lead Performance Metrics](#)



✓ Amazing AC Campaign

Campaign Start Date: Jan. 04, 2023

CAMPAIGN ENABLED

[Pause Campaign](#)
Campaign Schedule set to 33% of Week





1693 Leads
Received All Time

92 Leads
Received Last 30 Days

 **Cost Per Lead**
\$105.00 Cost Per Lead

 **Campaign Site**
[View Campaign Site](#)
[Request Content Edit](#)

 **Lead Delivery & Notifications**  **Edit**
Calls: (512) 124 4567
Email: clientperson@emailserver.com
Caller ID: Show Tracking Number - (469) 410-7732
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. The CPL is managed on a per Campaign basis and can be changed in mySD Campaigns Manager.

Adjust Campaign Status

Pausing your Campaigns too often can negatively impact Campaign performance. To adjust Lead volume, 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 Lead Delivery Settings

Check that you have your [Lead Delivery settings](#) optimized by ensuring that calls, emails, and text alerts are going to the right places.

Updating Your Microsites

For Select Campaigns, updating your Microsite(s) with your latest offers, awards or information will help continue to improve their conversion rates. The following assets are critical in increasing your conversion rate, and ultimately the number of Leads generated per Campaign.

- Add/Update Service Offerings
- Add Testimonials
- Add Photos of Completed Work
- Add/Update Licensing or Certification Information
- Add/Update Company Awards and Recognition

Learn more: [Using Campaigns Manager](#)

ACCOUNT SETTINGS

Add Additional mySD Users

You can add multiple Users to your mySD account.

- Add Billing contacts to help manage Billing activities.
- Add Marketing contacts to help manage Lead Progress.
- Add more Users who can respond to incoming Leads.

Customize Notification Settings By User

User-specific notifications enable the right notifications to be delivered to the right people on your team.

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

WANT MORE LEADS?

If you want more Leads from the Service Direct Select program, consider the following:

- Add Campaigns for any new Service Categories that your company is now offering.
- Add Marketplace Campaigns in all Service Categories to get more Leads from our Lead Partner Network.
- Expand the targeting for your Service Area.
- Increase the Cost Per Lead for your Campaigns.

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

GET HELP

- Get 24/7 answers via the [Help Center](#) articles and our Service Direct Chat.
- Email us at support@servicedirect.com or open a [Support Ticket](#).
- [Schedule a Phone Call](#) with one of our team members.

Learn more: [How to Get Help](#)