This document outlines issues faced by typical green industry businesses in their sales and marketing process and potential ways we could solve them.

Sales

Overview

In a typical green industry business, the sales process is pretty simple:

1. I get a lead.
2. I visit the property
3. I create an estimate
4. I get a yes/no.

In some cases - usually maintenance - you don't necessarily need to visit the property. An online map will enable a contractor to build a relatively accurate quote because it will show the property size/general difficulty.

The person responsible for sales is generally the owner for small organizations or a dedicated sales rep for large $1 million+ organizations. Refer to our buyer personas below for more information:

[Sam the Salesperson Owner]

[Aaron the Owner]

Repair work could be estimated by a field employee instead of the owner/sales rep. That process is similar, though they're usually getting a yes/no onsite. I.e. They've discovered an issue and need to generate an estimate for the decision-maker to approve in order to complete the work.

Some businesses also leverage their field staff to assess items that need to be fixed/upgraded/retrofitted while they're onsite. So they leverage assessments that are then delivered to customers and, if the customer doesn't buy, potentially followed up by a sales rep.

As far as priority, most businesses leverage an owner/sales reps. Less than 25% leverage their field team to sell. So our focus should be on processes/workflows that help the owner/sales reps be more efficient/effective.

Strategy

Our research has shown that for the majority of our target buyers the owner serves as the primary sales representative. As we know, he's busy and doesn't generally have a lot of time to focus on sales.

As a result, our product needs to focus on making it easy for the owner (or sales rep) to manage their sales process. So we need to give them tools that make it easy for them to prioritize what they should do and then streamlines the communication process.

Product

Issue: I don't know where my estimates/opportunities are in the process.
Solution: Build an opportunity/estimate board view that enables customers to see which estimates/opportunities are in each stage in the sales process so that they can see who's closest to buying as well as what tasks are overdue and upcoming for each stage in the sales process. So we're combining where folks are in the process and task management.

Prototype (Forecast WF)

Solution: Build more configurability into the sales process stages. Enable customers to set their own opportunity/estimate stages so they better understand and can have more granular detail into where their sales opportunities stand.There's not a prototype for this, but it'd essentially be the ability to create a pipeline, stages and then filters to display certain pipelines.

Issue: I want to spend an hour every day on sales activities, but I don't know what to do.
Solution: Create a list of activities/tasks that need to be performed daily. Similar to the opportunities/estimates board this would be a board with three columns:
1. Overdue tasks and activities
2. Tasks and activities due today
3. Tasks and activities due this week.

This list is prioritized by due dates.

Prototype: Note, the estimate board is a part of this prototype. Click the "Manage Tasks" button to access the task board. (Estimate Management WF)

Issue: I'm not capturing leads on my website/I have to manually enter them into my software solution. As a result, some are lost/no follow-up occurs.

Solution: We create a process that allows a customer to:
1. Configure a form by dropping in fields from FieldCentral.
2. Embed that form on their website
3. Send all completed form data to FieldCentral
4. Create tasks and alerts to automate the sales follow-up of those forms.

Prototype (Marketing Web Form WF)

Issue: I don't have the time/resources to effectively follow-up with my leads.

Solution: Build better automation tools to:

1. Alert Sales Reps when they need to do things. Examples include:
    A. New leads have entered the system from web forms
    B. Tasks/reminders are past due
    C. Sent estimates are open X days from send date.
    D. You don't have any activities planned for estimates/opportunities

[Prototype (Business Assistant WF)]

2. Automate the sales process
    A. When a new lead enters through the website, send them an email that enables them to see the sales rep's schedule and schedule a phone call.
    B. Automatically email documents/offers/information about the company
    C. Automatically remind prospects when their estimate is X days old via email

There's no prototype for this.

3. Custom Workflows
    A. Enable customers to build their own custom workflows that include the ability to automate emails and tasks based on data in FieldCentral.

There's no prototype for this.

Issue: I have too many leads and need to qualify them to make sure they're a good fit.
Solution: After we use our web form to capture a lead, include the ability to send a follow up email with a link to a landing page that includes a series of customizable questions a business can ask of that lead. If any of those questions disqualify a lead, flag it for review and enable the ability to send a follow-up email or create a task to call letting the customer know that they won't be creating an estimate.

The rationale behind this: A simple form will generate more leads. Longer forms lead to fewer leads. So we want to be able to capture leads and then qualify after the leads have been captured.

Prototype: Note this is just the web form prototype which includes an option to create a follow up email. How this would work: Someone would create a simple form to capture leads. Then, we'd automatically send a follow-up email with a link to a qualification form that would capture more information. That qualification form would be created through the same form creation process.

Issue: I can't adequately forecast my operational needs based on my estimates.
Solution: Build a forecast view that leverages a new confidence field to forecast dollars that are expected to be closed over time. Note: This is something that is more appropriate for larger

organizations with non-owner sales representatives. This would allow the owner or operations manager to see what might be coming down the pipeline.

Prototype (Forecast WF)

Issue: When I'm creating an estimate, I don't know how accurate my numbers are. I want to see similar estimates.
Solution: When creating an estimate, allow the user to slide-in or pop-up completed estimates using the same estimate template or the same set of services.

Prototype (Estimate Comps WF)

Issue: I want to be able to create/deliver/store/access as-builts for projects I bid on.
Solution: The ability to store attachments with opportunities/estimates that converts to the property attachments

Prototype (Opportunity-Attachments WF)

The ability to create drawings on a map of where things - sprinkler heads/pipes/valve boxes etc. are on a property and then save that drawing with the opportunity/estimate.

The ability to send those attachments to the field so they can access the as-builts.

Potential future improvements include integrations with one or many CAD software solutions for the green industry.

Issue: I want to generate a bid without visiting the property
Solution: We're building this for maintenance, so I won't go into more detail.

Issue: I want to leverage my field employees to generate upsell/retrofit opportunities.
Solution: Allow for the creation of a sales assessment, create tasks for my sales rep based on that assessment and ultimately track revenue generated for each technician/crew for commission/bonus..

Marketing
Marketing processes in typical green industry businesses aren't all that complex. They generally get new customers through word of mouth. Their primary focus is generating new revenue from existing customers and landing new customers. They generally don't have any dedicated marketing resources and most of their activity is done by the owner or an office manager, so it's not a priority.

Strategy:
Our sales focus has primarily been on making the process of selling easier on a very busy owner. For marketing, our goal is the same, though realistically this solves another common issue: I want to generate more leads and revenue. I see the sales functions as making managing the sales pipeline easier. The marketing functions are actually designed to make building that pipeline easier. So most of the items here are designed to deliver more sales opportunities.

Like our sales strategy, our marketing strategy needs to be relatively turnkey. The office manager or owner doesn't have a lot of time - or they do, but it's in the offseason. So we need to be able to quickly create marketing campaigns and/or be able to schedule them so they can be created in the offseason and automatically scheduled and sent when they're busy.

Issue: I want to upsell new products to existing customers.
Solution:Couple solutions to this problem.

1. Enable the ability to create upsell campaigns, which would include email templates and create phone call tasks related to campaigns.
2. Create a Business Assistant item that determines what products and services are frequently bought together or after each other (ie if we find customer who buys a mow/blow package with fert but there's a customer who bought just mow/blow, we flag that customer in Business Assistant as an upsell opportunity for fert.
3. We can create workflows that enable customers to automate upsells through workflows that they configure.

Issue: I want to sell to people in neighborhoods I already service.
Solution: Build our own or integrate with someone like TargetNeighbors to allow customers to create direct mail campaigns to properties in neighborhoods they serve to build better route density or grow their territory. Thoughts on this:

1. We need postcard templates that can be edited.
2. We'd need an on-demand integration with a print house
3. For generating mailing addresses, we can either build that ourselves or partner with someone to get us the data.

Issue: I want to automate messaging to my customers and prospects.
Solution: From a marketing perspective this can be broken into two parts:
1. For my customers, I want to send out seasonal messages promoting additional services I offer. Our solution would enable them to create email templates and then schedule those templates to go out either at scheduled dates or after a certain number of days of the last one. Basic email marketing automation.

2. For my prospects I likely want to do the same thing - nurturing my prospects that didn't buy over time. Send them offers, new product/service notification, that kind of thing.

Issue: I want a better social media presence and engagement.
Solution: I don't see this as anything more than a long-term solution, but we could integrate with leading platforms (Facebook/Twitter) and enable customers to publish messages and track activity from within FC.

A way to get better engagement is through something similar to our HindSite Ambassador program. I've had three of our customers ask how they can create something like that. That's a long-term add-on in my mind.

Issue: I want to measure my customer satisfaction and take action to improve my satisfaction.
Solution: Similar to Solution, enable the ability for a customer to drop a "Review Us" link into FC that takes them to a survey asking them to rate their service.

That survey drives a NPS graph on their dashboard.

The Business Assistant includes people who left negative feedback that require follow-up.

Issue: I want to generate more online reviews.
Solution: Customers want to filter their happy customers and solicit them for reviews. One way to do that is, after a customer leaves a 5 star review, take them to a Thank You landing page that asks them to leave a review and provides links directly to review sites.

We can also automate a "Thank You" email to those folks that includes links to review the business.

Issue: I want to generate more leads from my website.
Solution: The best way to generate more leads from a website is:

1. Build a good, high-converting website
2. Drive traffic to that site.

For green industry businesses, that generally means ranking high for local search terms. There frankly isn't a ton we can do for businesses in this respect, unless we build an entire website platform and build intelligence into it that recommends ways to improve local search rankings.

So this is a very long-term solution.

We could also partner/integrate with a good green industry-specific agency that designs high-converting websites and knows their way around local search optimization strategy and tactics.

Issue: I want more referrals.
Solution: Enable the ability to create referral campaigns. Customers would:
1. Be able to filter to find customers who have left them positive reviews on the customer sat surveys.
2. Send them information about their referral program
3. Track referrals by customer through our estimates/opportunities
4. Reward customers based on those referrals.

We could partner/integrate with a reward company so customers could automate a lot of that process, including sending electronic gift cards to referees.

Issue: I want to use paid online marketing channels and track my results.
Solution: Another long-term solution would be integrating with:

1. Adwords - To enable customers to create and analyze Google ads. The benefit - They'd be able to track who came in from what ad spend and see real-time ROI.
2. Adroll - Adroll is a retargeting platform so this would tie into things like upsells to customers as well as displaying ads to people with estimates in the pipeline. Again, the benefit to the integration would be able to show an end-to-end view of what the spend resulted in ROI-wise