CONTRACTOR APPOINTMENTS

Contractor Appointments ONBOARDING GUIDE

www.contractorappointments.com

HELLO,

Welcome to Contractor Appointments – we're so glad you're here!

From the moment we stepped into the home improvement industry we have intentionally made the effort to set ourselves apart from other lead generators. In late 2020 we chose to make a pivotal choice: we could follow suit of other lead generators around us and focus on selling leads for more money to more companies, or we could rethink the entire model and build a platform that actually helps people like you!

Our desire is to build a platform where pros feel treated fairly as partners, where you only pay for projects that you're hired for instead of paying for lead fees. Our ultimate goal is to see you incentivized to serve homeowners, because when you do, you gain access to more and more opportunities. We want to see homeowners come back time after time for their next project for years to come!

The purpose of this guide is to give you an inside look into who we are, what we do, overall processes and expectations, and how you can utilize your dashboard to your advantage. Take a look around and get comfortable!

We're excited to have you on board and to begin partnering with you as you step towards scaling your business, exceeding your goals, and gaining more customers!

Let's grow together,

Sean Conners

CEO

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WHAT WE DO

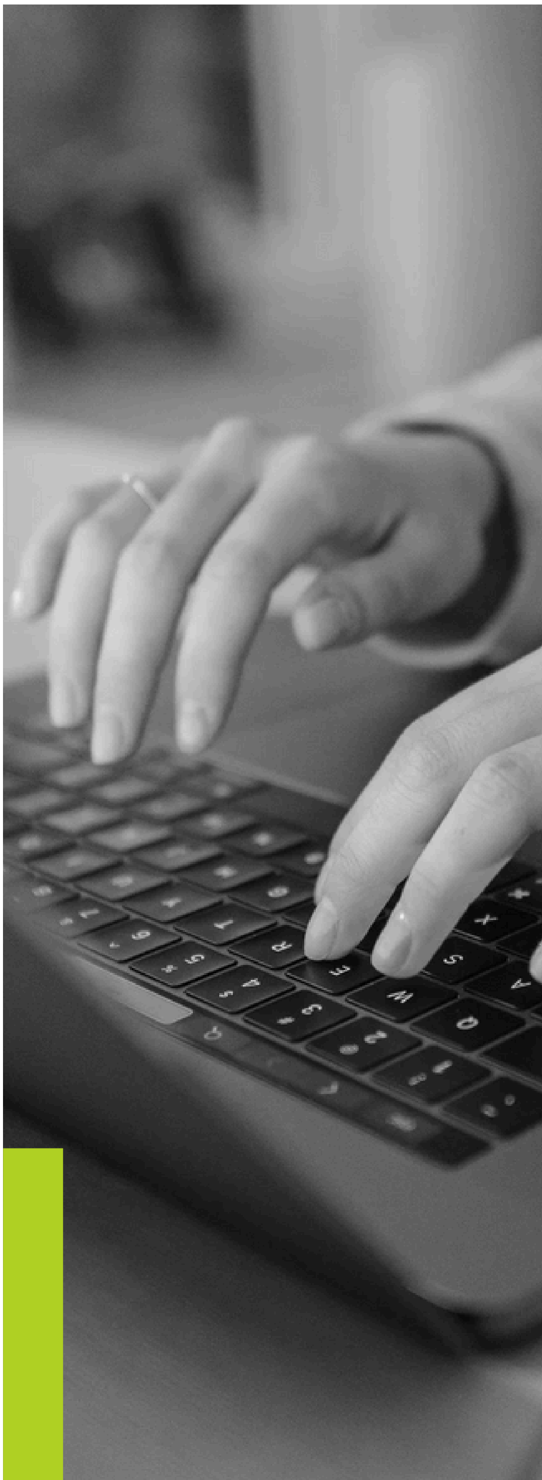
We make finding new customers easier and faster for home service brands. With **60,000+** unique homeowners requests per month, we strive to provide the needed lead volume you're looking for!

TRADES WE OFFER

- Roofing
- Windows
- Siding
- Gutters
- General bathroom remodels
- Wet space conversions
- Walk-in tubs

HOW WE GENERATE LEADS

We find homeowners who are interested in a trade with the intent to purchase, gather their information, and match them to contractors who fit their needs – you! Contractor Appointments currently generates leads through two main avenues:



1 | INTERNAL MARKETING

- Social Media - Facebook, Instagram, YouTube, etc.
- Paid Search/Google SEO
- Owned and operated websites and direct media buyers

2 | THIRD PARTY SOURCES

- Indirect affiliate partnerships
- Informational websites
- Aggregators (shared and exclusive leads)

PRODUCTS WE OFFER

Contractor Appointments offers two different products –
Pay Per Sale and Pay Per Appointment. Here's how they work:

PAY PER SALE | PPS

Looking to scale your business? Pay 12-15% of net sales and create predictable marketing costs for your company with this revenue share model. Revenue share allows the alignment of marketing and sales in order to optimize accounts!

PAY PER APPOINTMENT | PPA

Pay for appointments on a pay-as-you go model! Customers book specifically with your company online, over text, or inbound call. All you need to do is call to confirm and run the appointment.

With returns model:

- Windows + bathrooms: $400/appointment
- Roofing + siding: $350/appointment

No returns model:

- $165/appointment

REVENUE PER APPOINTMENT

At Contractor Appointments, we function off of something called Revenue Per Appointment (RPA). It's important that accounts onboarding with us understand what RPA is and how it impacts their ranking on our platform!

WHAT IS REVENUE PER APPOINTMENT + WHY DOES IT MATTER?

Revenue Per Appointment boils down to a simple calculation: **total fees paid (your cost) ÷ total appointments delivered.**

RPA determines and impacts your ranking on our platform! After homeowners fill out their zip code and trade information, we match them with their top 3 local pros through our Contractor Matching Tool. With only the top 3 ranking pros visible in any zip code/trade, it is vital to understand how to rank within the top 3, and understand the importance of each position:

Position #1: To receive the most lead volume it is imperative to be ranked #1. Ranking first puts your company's calendar and offer prominently on the results page and shows you as the preferred pro. This is especially important because homeowners often choose to book only 1 or 2 estimates on their projects.

Positions #2 & #3: Offered to the homeowner after their first appointment is booked as a comparison OR are manually selected after bypassing the pro in position #1. **Ranking below position #3 will result in little to no volume.**

Continued →

The great news is that you have full control over your RPA! You can control your RPA by:

1. Your Total Sales Fees / Total Appointments Received

- Some companies may choose to increase their price or % to gain a competitive advantage.
- Only companies closing consistently at a high rate will compete.

2. Update All Hired Projects Daily

- Ensure you mark appointments as "Hired" as soon as the contract is signed, past rescission, and financing is approved.

3. Follow up and rehash past appointments that were either “No Bid” or “Bid Lost”

OPTIMAL REVENUE PER APPOINTMENT

On average, accounts will need to maintain a minimum Revenue Per Appointment (RPA) of $165+ (this may vary by market) to consistently compete within your market. Accounts that continue to stay below the optimal RPA will likely result in significantly lower volume.

**Please note: RPA is calculated per trade category. You may rank higher in one trade vs. another.*

HOMEOWNER BOOKING JOURNEY

There are 3 main ways that homeowners can book an appointment with us: SMS, inbound calls, and online via our website *(most popular!)*.

1 | SMS

After filling out a form indicating interest in a project, our robust SMS system will immediately follow-up with the homeowner to set an appointment. This system is partially automated and monitored by our expert team of Project Guides. Through SMS we will:

- Walk through our basic qualification process (see **What We Qualify** on **this page**!)
- Help the homeowner select a date/time that works for them
- Set the expectation that the contractor will be reaching out to confirm details

**We will also follow up for up to 2 years via SMS if the homeowner is not ready to meet or doesn't respond.*

2 | INBOUND CALLS

We receive some inbound calls to our Project Guide team who walks homeowners through our basic qualifiers and booking process over the phone.

Continued →

HOMEOWNER BOOKING JOURNEY CONTINUED

3 | ONLINE VIA OUR WEBSITE (100% SELF-SERVE)

This is how the majority of homeowners book appointments - our online booking form provides a no hassle, 100% self-serve option to booking! When booking via our website, homeowners are taken through our basic qualification process through a series of questions (see **video** walk-through).

To enhance security and ensure the highest quality appointments, we've recently added an SMS verification step after the homeowner enters their mobile phone number in the booking form (during this A/B testing phase, 50% of mobile users will receive this verification code). This step is required before the homeowner can proceed to booking their appointment with you.

By implementing this extra verification step, we aim to significantly improve the quality of our appointments! We will be monitoring this new optimization feature for effectiveness.

After answering the series of questions, homeowners can see who they match with according to their zip code and the project details they selected. Homeowners then have the option to choose their local pro(s) and select the date and time that works best for them to book their estimate(s). *(Homeowners can book a maximum of 3 estimates.)*

WHAT WE QUALIFY

Our team takes leads further down the funnel by filtering them more than other lead aggregators! Here's what our Project Guide team will qualify when setting an appointment with a homeowner:

- Homeowner's name and address
- Preferred appointment date and time
- Trade
    - Repair or replacement
    - Material type (Roofing and Siding only)
    - Quantity (Windows)

We consider appointments to be "soft-set," as your team will be confirming more granular details and in-depth qualifiers once you receive an appointment from us!

WHAT TO EXPECT

CONTRACTOR APPOINTMENTS

APPOINTMENT DELIVERY

Once an appointment is set, it will automatically populate in your dashboard, and your team will also receive email and SMS notifications. Your team is then responsible for reaching out to the homeowner to confirm any other questions and details related to the appointment itself! We ask for a minimum of 6 calls and 6 texts for each appointment delivered to you.

**We require one email in our system for email notifications.*

APPOINTMENT NOTIFICATIONS

When a homeowner reschedules or provides feedback to us, we'll update the appointment details in the dashboard and notify your team via email and SMS (if opted in)!

It's important that you receive all appointment updates for your team to optimize conversions and preserve the homeowner experience, so please make sure you provide your account manager with the correct email address(es) and phone number(s) to receive these notifications!

CRM INTEGRATION

Looking to integrate your CRM? No problem! Let your account manager know, and our team will handle the integration!

DEMO RATE

Because these appointments are soft set, we expect some will fall off along the way – you can expect around 40% of appointments to result in a demo, with an average cancellation rate of around 30%.

BEST PRACTICE

Reach out immediately once the appointment comes through, utilizing phone calls, SMS, and email. The quicker you can get to the homeowner, the higher chance you'll have of keeping them engaged and locking in that demo!

SMS AUTOMATION FEATURES

Contractor Appointments provides robust SMS texting features to engage with homeowners:

INITIAL APPOINTMENT DETAILS

Once a homeowner has selected their preferred date and time, they'll receive a text confirming their soft-set appointment details, and a notification that your team will be reaching out soon to confirm directly!

REHASHING + FEEDBACK

Based upon feedback you give us via dashboard appointment statuses, homeowners will receive texts (e.g., when they miss an opportunity with you) in order to encourage re-engagement with your team, and hopefully save the appointment! We work to save opportunities and rehash for up to 2 years via SMS.

All texts are sent and monitored by our Project Guide team! The Project Guide team is available from Monday through Sunday, from 7:00 AM to 8:00 PM CST. Any notes, messages, or cancellation requests we receive during that time will be sent over to your team via email.

PAY PER SALE EXPECTATIONS

UPDATING STATUSES

All Pay Per Sale accounts are required to update bids and statuses via the dropdown menu.

Status: New

Description: This status is the default system status of every appointment when it is initially booked.

Your team is expected to move the status out of *New* within 48 hours of the appointment passing. If appointment statuses are not updated, overall appointment flow will slow down and your account will eventually be paused.

Status: Confirmed

Description: This status is used once you have been able to speak with the customer and confirm their appointment.

We require contractors to move the status out of *Confirmed* within 48 hours of the appointment passing. If appointment statuses are not updated, overall appointment flow will slow down and your account will eventually be paused.

PAY PER SALE EXPECTATIONS

Status: No Bid

Description: This status is a catch-all for any appointment your team is unable to provide a presentation and price to. When selecting this status, you will also be asked to provide a *No Bid Reason* to help us understand what happened.

No Bid reasons:
- Homeowner no show
- Never confirmed
- Postponed project
- Project canceled
- Wrong project type
- Wrong info (address/phone)
- Renter/not homeowner
- Out of service area
- Chose another pro

We heavily rely on your feedback to help us evaluate the quality of our sources and identify areas of optimization. The more feedback you can provide in the notes, the better!

Status: Bid Working

Description: This status is used once an estimate has been provided and you are awaiting a final result. This may include follow-up, pending financing, pending insurance, pending contract signed, pending rescission, etc.

When selected, it is required to provide the bid amount that was given to the homeowner. Uploading the bid file is optional.

If a status is in Bid Working for over 30 Days, it will be marked as Needs Updating and can impact the account's appointment flow. If an appointment has not resulted in Hired within 30 days, you can mark it as Bid Lost using the reason Follow Up. From there you can continue to monitor the appointment and move it to Hired if it ends up closing later!

PAY PER SALE EXPECTATIONS

Status: Hired

Description: Move an appointment to Hired once it meets the below criteria:

- A contract is signed
- Financing/insurance has been approved (if applicable)
- The rescission period has passed

**Please note: Payment received from the homeowner or insurance is not considered pending. As long as the above criteria listed is met, the status should be updated to Hired immediately.*

Once the status is moved to Hired, our system will calculate and update the sales fee based on the contract total entered in the Bid Amount. Payment is due the following billing period.

Status: Bid Lost

Description: This status is used for any estimate given that did not result in a sale. When selecting this status, you will be asked to provide a *Bid Lost Reason*.

Bid Lost reasons:

- Price too high
- Insurance was denied
- Credit decline
- Canceled in rescission
- Chose another pro
- Follow-up

If the status was previously marked as Hired and then moved to Bid Lost, the system will automatically adjust the sales fee to $0 and credit the account balance.

YOUR ACCOUNT DASHBOARD

All contractors have access to an account dashboard, giving you and your team full access and control of your calendar, trades, market, and more!

TABS OVERVIEW

MY APPOINTMENTS

Appointments booked will automatically show up in your ***My Appointments*** tab under ***Upcoming Appointments***. Each line will show important information such as the homeowner's name, appointment date and time, trade, and contact information!

Need to reschedule an appointment? Once you've confirmed the new date and time with the homeowner, click the ***Reschedule*** link under the homeowner's name to reset! Rescheduling will notify the homeowner of their new date and time via automated text.

You can also view appointments by clicking on My Calendar.

TABS OVERVIEW

MY CALENDAR

Accounts are able to control and adjust their calendars directly within their dashboard:

- Click on ***Availability Settings*** at the bottom of the ***My Calendar*** page to adjust first and last appointment times available for all days of the week. Teams can also block off time slots for events such as staff trainings, meetings, etc., by clicking on any time slot and blocking it off.
- Click on ***Calendar Rules*** to set length of appointments, minimum time between appointments, and maximum number of simultaneous appointments! *If you are a smaller team, we'd suggest starting off with 1 appointment at a time - you can always increase the amount of simultaneous appointments as you grow and scale!*

Utilizing custom time slots? Reach out to Customer Support and our team will handle setting up your availability!

MY PROFILE

Filling out the pages under the My Profile tab will give homeowners a greater line of sight into who you are, what you're about, and what you offer! Be sure to provide as much information as you can, as the information you provide will be what customers see on the website. Please be sure to enter in a Company Phone number so homeowners can reach you if needed!

Preview what homeowners see by clicking on Profile Preview at the top of the My Profile page!

TABS OVERVIEW

CONTRACTOR APPOINTMENTS

MY SERVICE AREA

Our team will handle the initial bulk upload of your service area – simply send over your zip list and we will take care of it! You can easily make adjustments to your market as you go by clicking on the ***My Service Area*** tab:

- To add or remove zip codes, simply select ***I need to update my service area***, click to add or remove zip codes, and hit ***Save***!
- To set up a service area via radius, enter in the zip code, select a distance, hit ***Apply***, and then ***Save***!

MY TRADES

Need to add a trade? Click ***My Trades*** and use the toggle feature to the right of each project type, and then select the preferred material types(s). To turn off a trade, simply hit the toggle button to disable.

USERS

To add or edit users tied to your dashboard, click ***Edit*** under names or ***Add User*** in the upper right-hand corner of the Users page. Make sure to select ***Email Notifications*** and/or ***Text Notifications*** for each user to ensure they receive notifications regarding booked appointments!

BILLING

Accounts can easily view transactions and edit their billing method by clicking on the ***Billing*** tab! You and your team will be able to view all appointment transactions and their respective dates and times in the Credit History table.

If you need to add a new card, follow the steps to set up the new one, and then delete the old card – the system requires one on file at all times!

CONTRACTOR APPOINTMENTS

RESOURCES + TOOLS

Visit the *Help Center* tab in your dashboard to access articles answering FAQ and best practices!

CUSTOMER SERVICE SUPPORT

Have a question we can help you with?

Reach out to us at *support@contractorappointments.com*, or start a chat with us via the blue chat bubble in the bottom right-hand corner of your dashboard, and our team will be happy to assist you!