

BETTER THAN DOUBLE IN TWO YEARS

**HOW CORNERSTONE'S EXPERTISE HELPED AN
HVAC CONTRACTOR REACH THE NEXT LEVEL**

A white paper for contractors from Tracy Paul, Principal
CORNERSTONE ADVERTISING & MARKETING

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EMILY AND CHRIS CUNNINGHAM

KNOW WHAT IT FEELS LIKE TO HAVE
YOUR BUSINESS EXPERIENCE WHAT
SOME CALL **A PLATEAU.**

The couple entered the Indianapolis HVAC market when they started Service Plus in 2003 and quickly began to rack up referrals. Chris oversaw sales while Emily managed the operations side as the company grew into a larger facility with easy access to the metro area's Interstate 465 loop.

Their family was growing, too, and they found themselves focused on the future they wanted for their little ones. If they kept growing the business over the next couple decades, their kids could enjoy great opportunities. The day might even come when they'd turn the keys over to them.

Marketing was one of Emily's responsibilities, and when work and family piled up, it was the one that could be deferred. She'd try new things, but the results were often disappointing.

EMILY: *"I was doing it all myself. So I was doing all the creative, I was doing all the emails and the social media posts ... and when I say I was doing them, I wasn't doing them well. Every year, I would create a marketing plan and calendar and every month I would end up feeling like I just wasn't ahead of anything and wasn't prepared for the next season."*

Another owner suggested the couple could use some professional marketing help and recommended they talk with Tracy Paul about Cornerstone.



OH, THAT "DOUBLED THEIR BUSINESS" THING IS REAL. WHEN EMILY AND CHRIS STARTED WORKING WITH US, THEY DID \$8.5 MILLION IN BUSINESS. TWO YEARS LATER, THEY DID \$17.5 MILLION AND SERVED ROUGHLY TWICE AS MANY CUSTOMERS.

TRACY: *"I was primarily talking with Chris, and I said, why don't you come on over, and we can talk about what you're trying to do. I gave them a tour of our office, handed them a proposal, and they signed it."*

While Emily and Chris did agree to the proposal, it required some convincing.

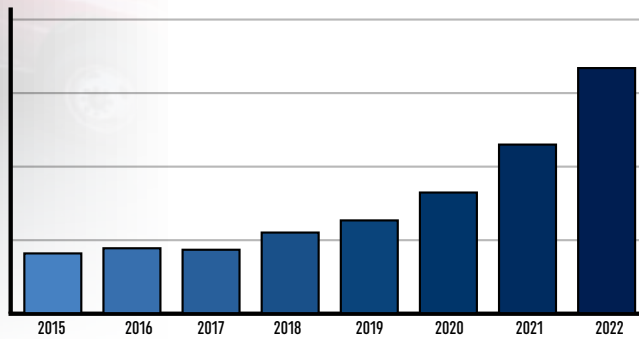
TRACY: *"Chris laughed at the amount. Emily looked at me and said, 'No way.' I kind of shrugged and said if you want to grow the business, these are the things you need to do. They had to borrow my confidence and experience to do something that was remarkably uncomfortable for them. Spoiler alert: it worked."*

Cornerstone's first task was getting to know the couple and their business. Conversations addressed values, objectives, approaches, likes, dislikes, and more. For example, how did the owners envision the future of the company?

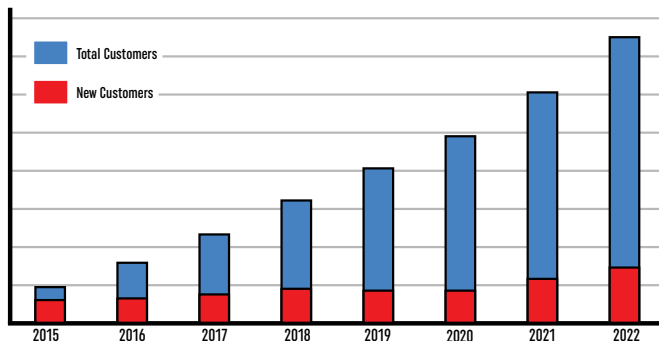
EMILY: *"My husband and I love the work we do and the community we serve. Plus, we have little kids. If we grow our business, we can help more customers, we can provide more great careers for the 75 people that are on our team, and we can grow the team. And yeah, we just wanted to continue to grow and offer our services to more people."*

TRACY: *"There's something that happens when you mix good operators and good salespeople with good marketing. Emily's a really good operator. Chris is a really good salesperson. They did a nice job of being able to capitalize upon and take advantage of opportunities. As we grew the customer base, they were also able to mine it and their strength in mining was one of the key things that allowed them to double the size of the business in our first two years together."*

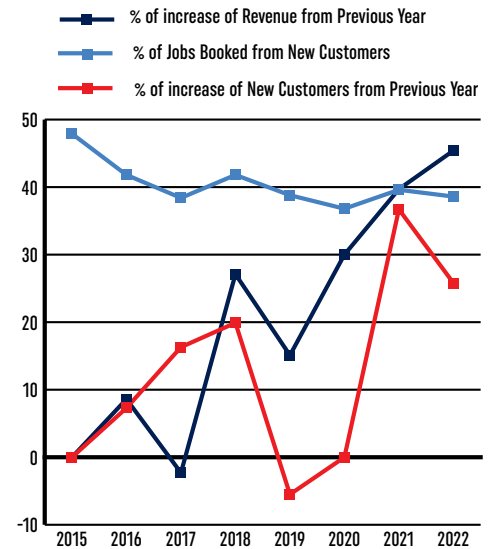
COMPLETED REVENUE



TOTAL CUSTOMERS



GROWTH OF NEW CUSTOMERS



TRACY: "Marketing and advertising expanded the customer base. Let's say it grew from 5,000 customers to 10,000 customers. If you only touch those customers once, they represent 5,000 unique selling opportunities. But they were able to turn those 5,000 customers into two or three selling opportunities. And so they had 15,000 selling opportunities off the 5,000 new customers we presented. It's their business philosophy and their efficiency at selling."

The owners absorbed Cornerstone's knowledge, earned through decades of helping other HVAC businesses succeed.

EMILY: "Their experience in the industry is helpful, because as a business owner, you tend to be in a vacuum."

TRACY: "Our strategies are uniquely specific to the HVAC industry, and built upon a model focused on knowing consumers' natural buying habits. Put another way, we know exactly why the phone rings more on certain days and that knowledge affects our advertising choices. We know what keeps owners up at night, and we've helped their counterparts elsewhere address those issues."

The approach was highly collaborative, with Cornerstone approaching every step as though they owned a big share of the business.

EMILY: "We established a budget right off the top. They said this is how we work together to create the budget and decide how we were going to spend it. There was clear communication and clear direction about what needed to be done."



	TOTAL CALLS	OUTBOUND CALLS	INBOUND CALLS	INBOUND CALLS FROM MARKETING CAMPAIGNS	INBOUND CALLS FROM NON-MARKETING CAMPAIGNS	INBOUND CALLS FROM MARKETING CAMPAIGNS JOBS BOOKED	INBOUND CALLS FROM NON-MARKETING CAMPAIGNS JOBS BOOKED
2022	138004	83627	54377	25893	28264	8315	9263
2021	110896	66964	43931	21859	20955	7200	7726
2020	89873	55440	34432	16425	17990	5688	7002
INCREASE OVER PREVIOUS YEAR							
2022	24.4%	24.9%	23.8%	18.5%	34.9%	15.5%	199%
2021	23.4%	20.8%	27.6%	33.1%	16.5%	26.6%	10.3%

TRACY: "Marketing is about both working and non-working capital. Working capital is the media you buy. Non-working capital is what it costs to shoot TV commercials, produce direct mail, create a new ad. A good ratio is 85% working and 15% non. If you're running a 70/30 ratio, you'd better hope your creative is a grand slam every time, because your presence in the marketplace is 15% smaller than it should be. Anything you can do to bring costs down puts the math in your favor."

When Cornerstone started working with Service Plus, the company's maintenance membership program had been performing way below hoped-for numbers. Cornerstone brought strategies they'd fine-tuned with other clients, boosting numbers and building customer relationships.

EMILY: "They've helped us communicate to our member base. We had this really awful membership flyer that had way too much information. They created a great visual

and a handout for our guys to use in the field when they're talking to our members. They help me communicate the value of our membership club through a series of follow-up messages. For example, when someone signs up, we send them a thank-you card and gift, as well as information about all the savings they can get from having a membership. And it helps with retention."

TRACY: "There's the conversion process and the retention process. How do we sell maintenance agreement memberships to service customers? And once they become a member, how do we retain them? The way to grow something is establishing goals and holding everyone accountable for those goals. And that was one of the ways we helped them grow that program."

Just as important, Emily welcomed Cornerstone's collaborative approach to messaging and creative.

EMILY: *"Our marketing is a representation of the company my husband and I built from the ground up. Our family grew alongside our business, and it's an extension of our family. We love it like family and we love our people like family. Cornerstone asks, are you sure this is the direction you want to go? Is this what you want to do? Is this the way you want this message to appear? I really appreciate that."*

TRACY: *"We have a unique relationship with Service Plus because they serve our community. Their people know our names. We participate in staff meetings. Their techs understand how our work affects theirs, and we learn from them. So we're able to connect what we say in advertising to what Service Plus delivers from that first call, to the conversation with the sales rep, to the materials they're handed."*

Emily also values the data Cornerstone collects, along with their willingness to adjust their reporting to match her approach to planning.

EMILY: *"I told Cornerstone what I use as my metrics for success. When they present data, it's according to what I requested. They really customized it for me. Working with them truly is like having your own internal marketing manager for your company. Like having your own internal marketing team with such talent and rich industry knowledge. And I didn't really understand what that meant and I didn't really know how much I could lean on them when we first started working together."*

Most of all, she appreciates the many ways in which the Cornerstone team respects the value of her time and the importance they assign to her company's needs.

EMILY: *"Communication with Cornerstone is very predictable. And so that's something that I really appreciate because I'm a busy business owner and I don't want to field a bazillion questions a day. So we have a 90 minute meeting once a week, same time, starts on time, ends on time. And they're really responsive. I call them and I say, the phones aren't ringing ... what's going on? And they'll immediately pull levers and do whatever it is that they need to do to try to get the phones to ring."*

In just two years, Cornerstone's approach has helped Emily and Chris double the annual volume of their business. The pair has strengthened their company's reputation as a top-quality, customer-focused leader in the hotly competitive Indianapolis marketplace ... and they're excited to see Service Plus continue its remarkable growth.

THE CORNERSTONE TEAM WOULD WELCOME THE OPPORTUNITY TO DO THE SAME FOR YOUR HVAC BUSINESS. PLEASE CALL OR EMAIL US TODAY TO START THE CONVERSATION.

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YOUR OUTSOURCED MARKETING & ADVERTISING
TEAM FOR GROWING YOUR BUSINESS

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ABOUT THE AUTHOR

Tracy Paul is principal owner and founder of Cornerstone Advertising Inc., where he has helped HVAC and plumbing contractors of all sizes grow and become market-dominant companies in cities throughout North America for more than 25 years. Cornerstone is a full-service marketing firm that includes both traditional and digital advertising for the home service industry and gives contractors access to a complete marketing department for less than it costs to hire a full-time marketing director, using proven strategies delivered through an account manager who treats their business like it was their own.

Learn more at:

www.cornerstonead.com