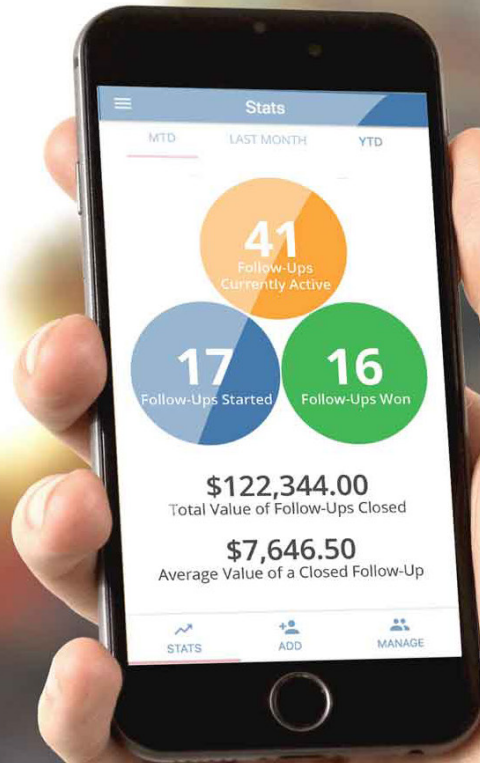


Case Study



Success with Follow-Ups:

How Leonard & Sons Building Services, Inc. used Closing Commander™ to close more high-quality jobs.

Leonard & Sons Building Services, Inc.'s Big Success with Follow-Ups

A case study on how a home service contractor used Closing Commander™ to target & close more high-profit jobs and improve seasonal cash flow.

There comes a time in almost every small business that the owner or owners cannot physically or mentally do one more thing. That's where the owners of Leonard & Sons Building Services (a third generation family owned and operated service business) found themselves. Father and son Rich and Caleb Martinez had reached a point in their business ownership where they couldn't work any harder than they already were, and yet they still wanted to grow.

There are two ways to accomplish growth when you are maxed out: you can add more people and go after more opportunities, which adds considerable cost and complexity, or you can evaluate your current activities, and prioritize your time and effort to get more out of the opportunities you already have.



Rich and Caleb knew that they wanted to try the second approach first, because they suspected that they were experiencing inefficiencies in their administrative and sales processes. If they could use a system to turn more of their existing high-dollar open estimates into closed jobs, they could spend less time on administrative sales tasks, and more time actually doing the work that they could charge a premium for. So if closing more open estimates was the goal, then following up on big opportunities was going to be the right strategy.

After trying manual follow-up methods and failing, they looked at large, complicated business automation software solutions. While the sheer power of such systems was certainly attractive, they instinctively knew it was more than they could make use of, at

a cost they could not yet afford. They needed something built specifically for the purpose of automating follow-up communication with customers.

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So when they heard about Closing Commander™ at a conference, they were eager to try it. It seemed to them that it fit their requirements perfectly. It was easy to add the simple step to their in-field sales process. It was easy to monitor the email opens, clicks, and replies. Their customers appreciated the consistent communication, which made them seem like a much bigger, more polished company with world-class customer service. But the sales results were what astounded them. They immediately saw a huge uptick in the number of estimates that were closing using the system.

The Goal

To follow up on the largest 50% (by dollar value) of open estimates provided to customers after an initial service call. Caleb and Rich would consider Closing Commander™ a win for them if they could close an additional 25% of these open estimates with the app.

The Outcome

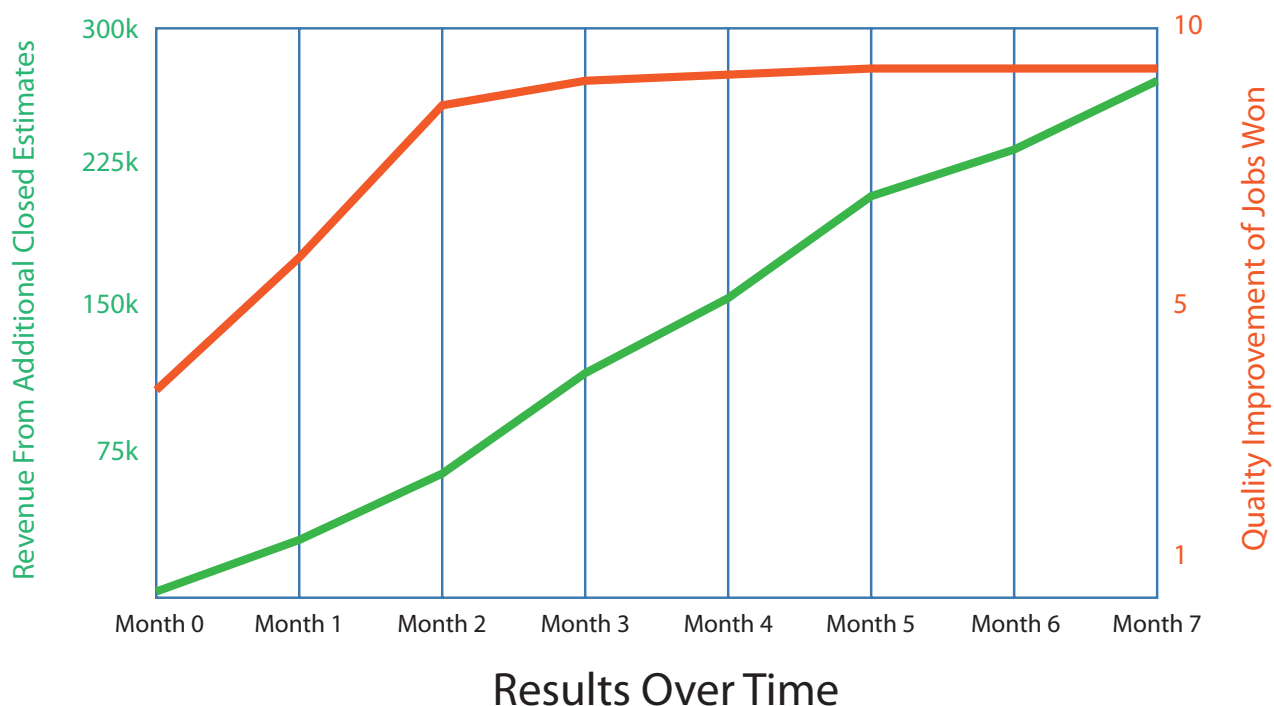
- Stress free, no worry follow up with customers
- Every high dollar estimate is now followed up and tracked
- Increased communication with customers has improved relationships overall
- Closed 41% of open estimates entered into the system in 7 months
- That 41% equated to an additional \$258,000 in off-season revenue
- Jobs won through the app were worth an average of \$6,809 each, which is a higher ticket than the company-wide average job amount
- They chose which estimates they wanted to put into the system, then the system took it from there and automated the rest
- They have been able to find out why some jobs were lost, gaining priceless insights for the future improvement of their sales processes and customer targeting
- A priceless feeling of confidence knowing their estimates are being followed up on

How They Did It

Because Leonard & Sons specializes in larger masonry and chimney repairs, and not just doing sweeping and inspection maintenance work, they wanted a system that would be beneficial to help them win the bigger jobs. So unlike some Closing Commander™ users who put every open estimate through the system, they decided which large jobs would be the best ones to go after and entered only those in Closing Commander™. This gave them the ability to follow up on the work that produces the most profit and value in their business, with the goal of reducing time spent bidding, winning, and fulfilling lower-value jobs that were eating up too much time and energy.

It wasn't long before they were seeing the direct benefits of this approach. By eliminating the profit-neutral work and concentrating on following up with their most profitable opportunities, they have been able to realize a significant boost to their annual bottom line and intentionally raise the customer value profile in their business. An additional benefit of this strategy meant that their seasonal cash flow stabilized, because larger projects are typically done in the summer months, a time of year that can be difficult to keep everyone working. It's this type of growth and predictability that excites Rich and Caleb the most.

The ability to target and win an increased number of ideal jobs in their business has improved many quantitative and qualitative factors of success - profitability, efficiency, and enjoyment, just to name a few. Having Closing Commander™ working for them has made life as contractors and home service business owners easier all the way around.



The Hurdles to Success

The biggest hurdle Leonard & Sons faced was having the confidence that any system could exist that would reliably handle follow-up communications. They had tried other manual follow-up methods before and had been disappointed, so they were skeptical that an automated system would work any better. The second challenge they faced was testing whether or not they would be able to target and win enough of the more profitable jobs they wanted, thereby changing their overall profitability and seasonal cash flow picture.

#1 Would Closing Commander™ really work for them?

In less than three weeks they began seeing big results as they tracked customer follow-ups sent, emails opened, links clicked, customer responses, and job wins through the system. They could see the actual trail from start to finish that gave them the confidence and reassurance that the customers that were supposed to get the follow ups were in fact getting them. They were also surprised at how little time it took to enter customers into the system, which was a relief.

#2 Would they win enough high-profit jobs?

Once they were sure the system and tool worked as advertised, they went to work picking the jobs that would be the most beneficial to their bottom line. And it worked! They weren't getting the 25% they hoped to get, they were winning 41%! And that 41% has added up to over a quarter million dollars of additional, highly profitable business in the first seven months of using the system (crossing the six-figure mark in month three)! And all they had to do was spend forty seconds per customer to enter the most desirable jobs. Wow!

As Closing Commander™ has continued to work for their business, Rich and Caleb have realized just how much money they used to leave on the table by not solving the follow-up process sooner in their business. They had spent a lot of well-meaning marketing dollars, and trained great employees to sell and provide estimates, yet hadn't realized all the positive effects good consistent follow up could bring. They knew it was important, but now they had an actual dollar amount they could attribute directly to consistent follow-up communication.

Thank you for creating Closing Commander. It has been an excellent tool for our company. It's a big time-saver, because the system allows us to focus on new opportunities coming in while it keeps in contact with estimates already sent out. Customers appreciate the communication, and we are receiving positive feedback from them all the time now. We are winning a lot of bigger jobs after three or four emails have been sent, and the stats in the app definitely prove the value every month!"



-Rich & Caleb Martinez, Leonard & Sons, Chicago

The Conclusion

Most home service businesses struggle to find a dependable process to email, call or text customers to follow up about open estimates, and so it just doesn't get done. But easily adding Closing Commander™ to your sales and marketing strategy and using it to automatically close more of the opportunities you have already paid to get will make a remarkable improvement in the effectiveness of your marketing spend, the perception of your overall customer service, and most importantly, your administrative stress levels. For Leonard & Sons, simply using our system has improved profitability and seasonal cash flow, and improved the quality and enjoyment of their business.

While the current system-wide average of additional closed estimates in Closing Commander™ is 14%, we regularly see much more than that for individual clients. You can go to www.followupproject.org/ and discover how much money you are losing in your business on a monthly/yearly basis when you don't follow up on every open estimate consistently and automatically.

*For more information or to get started now with a Risk-Free 14 day trial, go to:
<https://www.closingcommander.com>
or contact Jonny Lim at jonny@closingcommander.com.*