



RIVAL
DIGITAL

Smart HVAC Marketing Guide

Volume 1

Everything you need to know about hiring a
digital marketing agency

By Eric Thomas

Founder & President of Rival Digital

If you need to update or improve your marketing then you'll want to choose your next marketing agency wisely.

This guide will help you figure out what you need and don't need in your next agency. Rival Digital has been providing digital marketing services to HVAC and plumbing businesses like yours for years.

Many new clients have come to us after having horrible experiences with run of the mill agencies. We know a thing or two about what makes a good agency experience, and equally as important, what makes a bad agency experience.

We've been at this for quite some time. Our experience in helping companies generating leads online goes back much further than the founding of our company.

If you'd prefer to jump right into our free digital marketing consultation, then you can schedule a time that's convenient for you at rivaldigital.com/digital-strategy-session/.

What You'll Get Out Of This Guide

Our founder, Eric Thomas, got his start in the HVAC industry in the summer of 2014 as an apprentice for Warwick Mechanical Group. During this experience he discovered a passion for the trades, and in particular, how to help these businesses reach more customers.

Shortly after graduating from Western Kentucky University with a degree in Marketing, Eric began working for the world's largest home services franchisor doing SEO and website operations.

In 2020, Eric took the leap and started Rival Digital – a full-service digital marketing agency for HVAC and Plumbing businesses.

We've grown our business by applying the exact principles laid out in this document for our own business development. We leverage digital marketing to gain attention in the marketplace, to generate leads, and to win the trust of clients who benefit long-term from the results that marketing provides for their business and them personally.

We help our clients on a daily basis to advance their business, grow their revenue, hire more employees, and help them fulfill their mission. We do that by applying what's in this guide to our clients.

You've downloaded this guide because, when it comes to your marketing, you're probably feeling a lot like many of our clients did when they first came to us...stuck.

This guide will help you get unstuck and moving in the right direction.

Growing Beyond Just Word-Of-Mouth Referrals

Like most heating, air conditioning, and plumbing businesses, you're likely dependent on referrals for the majority of your current business. Referrals are great, and we love them too, but there are some issues with relying solely on referrals.

First, they're unpredictable. Although you hope that each of the clients you've faithfully served will refer you to someone else, the reality is that they may never even have that opportunity. If they do then you hope they'll remember to refer you!

Secondly, referrals are only generated from your network. One person's network is only so big. Hoping for referrals to come in from your network alone is a very passive way to grow your business.

Referrals are wonderful, but they're too passive of a means for you to bet the farm on. Further, hoping for anything is not a winning strategy.

You cannot grow your business on referrals alone. Referrals are simply not enough.

This is where marketing comes in.

The reality is that “marketing” these days is really digital marketing. Yellow pages are long gone, and newspapers aren’t far from suffering the same fate. The remaining traditional marketing and advertising options - TV, radio, billboard - are lumped into what marketers refer to as “spray and pray” tactics, meaning you’re advertising to everyone (at great expense) and hoping that the message gets to someone who needs to hear it.

Traditional advertising is a great way to increase your top-of-mind awareness, however, this is assuming that you reach enough homeowners at the right frequency for your company to be the first one they think of when the time is right for service, repairs, or replacement opportunities.

Another issue with traditional marketing and advertising is the lack of attribution. There is simply no way to determine if you’re wasting your money, and if so, where.

After years of doing digital marketing and closely monitoring what users are searching in Google, even if your company wins the air waves on radio, or dominates the billboard space, the customer is STILL going to go to Google and search for your brand name.

So even though you have done an outstanding job of dominating the market, your company still needs to have a well established, properly optimized online presence in order to be front and center when they search for you.

There’s a better way to reach potential customers lower in the funnel and be able to properly track attribution.

This is where digital marketing separates itself from traditional marketing. This guide explains how digital marketing helps contractors like yours achieve their goals.

How Prospective Customers Find HVAC Companies

After working with HVAC and plumbing contractors throughout the country, we've discovered exactly how your ideal clients find a service provider to work with when they don't already have one top-of-mind. The discovery process outlined below covers the vast majority of new client leads that HVAC contractors receive.

Here is the process that smart business owners follow to generate new leads from digital marketing.

1. The prospective customer has a need.
2. They search on Google for HVAC companies like yours.
3. They discover a list of contractors on Google (through an ad or a free “organic” listing) and are compelled by what they see on Google.
4. They click through to the contractor's website (if they don't click-to-call from the map pack or a Google Ad).
5. Once they land on your website, the homeowner typically will not reach out immediately, unless they have an immediate repair need.
6. The contractor can offer a call to action and a lead magnet, such as a downloadable like this one, to capture the prospective client's name and email address. If provided then the contractor can then reach out to them through their sales process.
7. Whether they provide their contact information or not, when they go to the website, you will want to “pixel” the user, meaning that a small amount of code on the website allows the contractor to advertise to them later on Facebook and Instagram.

8. They inevitably go to Facebook or Instagram. While scrolling through their friend's posts they will see an ad for the same contractor they previously discovered through Google. This reminds them that a) the contractor exists, and b) that they have unfinished business with that contractor.
9. They click through from the Facebook or Instagram ad, back to the contractor's website, and the contractor has yet another opportunity to let them know they should be working together.
10. The prospective customer will ideally request an estimate, or schedule service online.

That's an overly simplistic representation of the user experience for those searching for HVAC or plumbing services these days. Although simplistic, we've seen this cycle repeated thousands of times.

Our goal with this guide is to walk you through digital marketing tactics so that you can compete—and dominate—in the above process. Success in digital marketing is formulaic.

Follow the process we lay out in this guide and you'll be well on your way to drastically increase the number of leads your business receives on a daily basis.

Creating A Marketing Strategy

None of the marketing tactics listed in the above section can be properly executed without a defined, written, digital marketing strategy. This strategy works solely to meet your goals.

Consider that 228 million searches occur on Google every hour. That's 5.6 billion searches every day. That number keeps growing annually. That represents a tremendous amount of opportunity for you to get in front of prospective clients who are actively seeking your service.

But if you can't be found on Google then they'll go somewhere else. Wouldn't you like to help these clients?

How can you tap into this potential market and ensure that your business gets the attention of prospective clients looking for your help?

Clearly, digital marketing is incredibly necessary to gaining this market's attention, getting them to your website, and eventually helping them to resolve their HVAC or plumbing repair needs.

The solution starts with a solid digital marketing strategy. Marketing without a strategy is like blindly buying a plane ticket to anywhere. You'll get there, but you have no idea where you're going, when you'll get there, or if it is someplace you want to actually be.

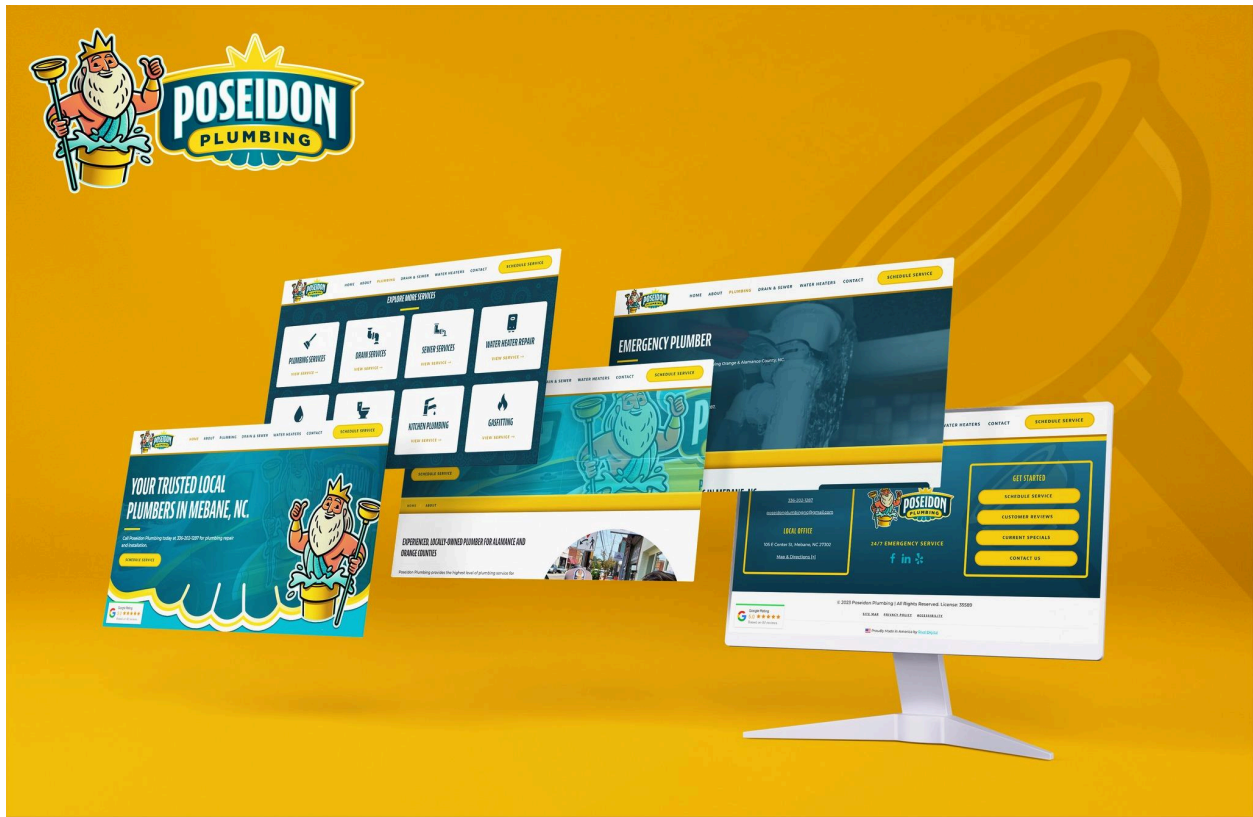
First, ensure that you have a solid marketing strategy which requires having solid marketing strategists on your team. Don't buy a plane ticket to nowhere!

To provide our clients with successful outcomes, we've developed core services that we offer to our HVAC and plumbing clients.

Website Design

Your website is the one place on the internet that you fully control.

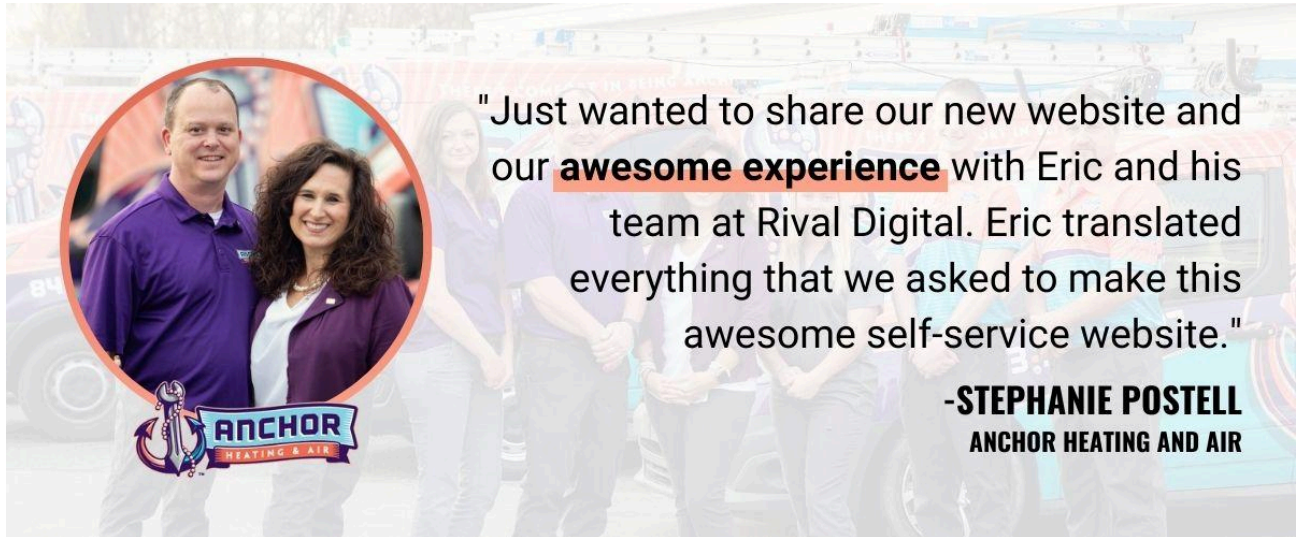
Your goal should be to create a website that is so informative that it will bring prospective clients to it, answer their questions, and inspire them to reach out to you for a consultation. When they do, a relationship is started and you'll have an opportunity to convert them into a new client.



First, we design a visually appealing, accessible, and healthy website. Of course it will be fast and mobile responsive. Those are must-haves on today's internet. But that's just the start.

The real magic is in laying out the website and the copy to entice your prospective client to reach out to you. That, at a minimum, is one thing that your website must accomplish.

Ours is a service-based model instead of a project-based model. In a project-based model, the focus is only on building a website and then handing it off to the client. That means that the client, you, now has to do the rest. You must learn how to update the website, host it, keep it secure, and market it.



Unless you have a team of marketers working in-house, the website developed for you likely won't be optimized or continuously improved upon and won't produce leads. That approach simply does not provide the best opportunity for success.

We do not charge a project fee to clients because we, and our clients, are looking for a long-term relationship. While project-based agencies require you to write a large upfront check and then pay them more for all of the extra services your website needs, we don't see that as a viable solution or in your best interest.

We charge one simple monthly amount that covers everything—the design, the creation of the website, all of the maintenance, and unlimited content changes.

Adding a new service like electrical or plumbing? We'll add them to your website. Offering a new financing option or special promotion? No problem...we'll take care of that too.

Everything you need to create a beautiful, lead generating website, and to keep it humming over the years is included in our website design offering. Our model drastically reduces the cost that clients would otherwise pay other agencies because we are here for the long term. With us, you pay one monthly fee for all of the services we offer, and we'll never nickel and dime you.



If this sounds perfect for you and you are ready to proceed with a new website, then book a free consultation with us now by visiting rivaldigital.com/digital-strategy-session/.

Once you have a website—a modern, fast, mobile responsive website that attracts clients—the next thing you’ll need is to get the attention of those clients. That’s where the rest of our digital marketing services come into play.

Questions to ask when hiring a website design & development agency:

1. Where is this website going to be hosted?
2. What platform do you build websites on?
3. How long will it take to design, develop, and deploy our new website?
4. Do I own this website once we’ve honored our minimum commitment?
5. Who will be building this website? (in-house developers or outsourced)
6. Who will be responsible for providing copy & imagery?

If you need help vetting website designers, or would like a second opinion—contact Rival Digital today. We will gladly review the proposal, terms and conditions, and give you an honest opinion if you are making the right decision.

Getting Found on The Internet

It's time to ensure that homeowners can find you.

People search Google billions of times a day. Our goal is for your website to be shown by Google when a prospective customer searches for a service that you offer.

A website is worthless if its target audience cannot find it. How do we make that happen?

There are several ways we do this, including:

- SEO: Search engine optimization allows your website to be on the search engine results pages on Google. Using these organic methods, we ensure your website ranks when someone searches for the services you offer.
- Ads: Ads are a form of paid marketing. Ads are put in place on websites, in search engines, and in numerous other locations that provide superior targeting of your ideal clients. You pay for them only when someone clicks on them.
- Social media: Consumers turn to the internet to get information and often use social media sites like Facebook and Instagram to find information. Your prospective clients hang out on social media. A lot. It's in your best interest to be there too.

Online Advertising

Online advertising is a way of capturing clients who are ready to hire a contractor for service, repair, or replacements. Advertising gets you in front of clients by offering a solution to their problem. It helps you build awareness of your brand, and many Google users will click through to your website.

Google Ads are a valuable tool because they allow you to present your HVAC business to millions of people. There are several types of ads, and part of what we do is to help you to advertise in the right locations, to the right people, for your company's individual needs.

It's also important to consider social ads. These appear on Facebook and other social media sites. They show up when your client is using social media to gather information on a service you offer.

Types of advertising management fees

Before getting started with online advertising. It is extremely important to know that you **WILL** be paying a management fee for an agency's services. This is how they make their money, as the budget for ad spend goes directly into Google and Facebook's pocket.

As a business owner, you understand that having a professional manage any aspect of your business—regardless of if it's marketing, coaching, bookkeeping, etc., that there is going to be a fee associated.

But understanding the different ad management fee models will help you better understand which agency to choose, and equally important, which agencies to stay away from.

The different ad management fees are typically:

- Percentage of ad spend
- Percentage of ad budget
- Flat-rate ad management

All of these have pros and cons, which are listed below. This is **VERY** important to read and fully understand.

Percentage of ad spend is a model that used to be extremely popular, however there are pros and cons.

The pros are that you don't pay a high of a management fee if your campaigns aren't spending the anticipated amount. The cons are that if your campaigns are performing well and spending a healthy amount, you'll pay more without the agency actually doing more work.

Percentage of ad budget is a model that also used to be common, but should be avoided these days.

With this model, you would pay the agency your entire ad budget, then they would set aside a percentage of the budget for their management services, and then spend the rest.

So for example, if your budget is \$10,000/month, and the agency's ad fee is 25% of ad budget, they would set aside \$2,500, and spend \$7,500. This means that you are getting less ad spend than you anticipated. It also requires a strenuous checks and balances system to verify that they are spending the money.

The fear many business owners have with advertising and digital marketing is smoke and mirrors and unethical reporting. With percentage of ad spend and percentage of ad budget, you will constantly have a fear that the money you are paying them isn't actually getting spent appropriately.

With flat-rate ad management, you know exactly what you are paying the agency, and then your card goes on file with Google or Facebook. This allows you to directly see how much is being spent.

However, there are cons with flat-rate ad management. Say the rate is \$1,500/month up to \$5,000 in ad spend. This means you are going to pay \$1,500 regardless of if you want to pony up \$5,000 in ad spend.

The other con is that you are going to receive a notification via email every time you spend \$500 with Google. Though this is nice to know, it can get pretty annoying.

But there are many pros...

If a campaign is performing really well and is generating new business for you, wouldn't you like to get more of that action?

I assume yes.

With flat-rate ad management, you can have your agency increase the daily and monthly budget without having to re-work contract structure, payment terms, etc. They can increase the budget quickly, and there are fewer barriers.

Another pro that not many business owners understand is that if you place your company credit card on file for your advertising, you can get credit card points for travel. That's more of a selfish pro, but it's your money, and you should benefit from spending it!

In the end, I strongly recommend flat-rate management. It's easiest for your agency partner to manage, it makes it easy for you to anticipate your marketing expenses, and offers a far lower ad management percentage if you take advantage of the various thresholds.

At Rival Digital, we offer flat-rate advertising management. We've used various pricing models for advertising in the past, and the clients we've served with this model have seen greater success.

Questions to ask when hiring a PPC company:

1. How is your management fee structured? (percentage of ad spend, flat-rate, percentage of ad budget, etc.)
2. Will I have access to my ad account, or will you own the account?
3. How do you track ad spend to ensure we don't overspend or underspend?
4. How often will you make adjustments to our ad campaigns?
5. How do you track success when running PPC campaigns?

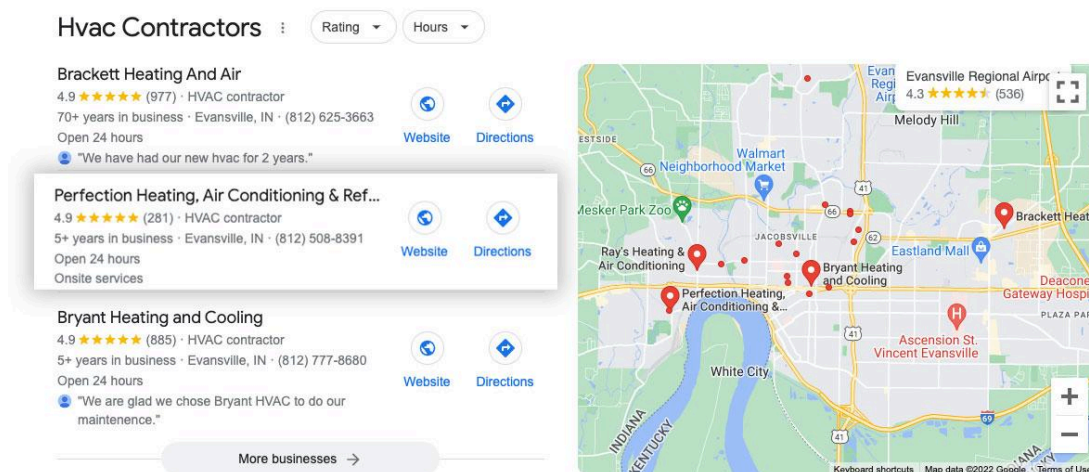
If you need help understanding the different questions listed above for PPC services. Contact us today. I will personally walk you through each one so you can enter the decision making process well informed!

Local SEO

Local SEO is an important type of digital marketing that's critical to service-based companies like yours. It allows you to focus your search engine optimization efforts on clients who are local to you.

Often clients want and need to find a local company to meet their needs. But if you are not ranking as well in the search engines for the services you offer in the local market you serve, no one is going to be able to find you.

If you Google for the service you offer, such as “ac repair near me” what is displayed for local results?



You may notice what's called the local pack—a group of contractors that are displayed at the top of the local results. These contractors have healthy Local SEO, and are often businesses that are located within 3 to 5 miles from the searcher.

Three to five miles may not sound like a lot, but do the math.

You may recall from high school that the area of a circle is πr^2 , where $r = 5$ miles. So a five mile radius is over 75 square miles! That's a lot of territory around your office that you should be covering, and Local SEO will help you do just that.

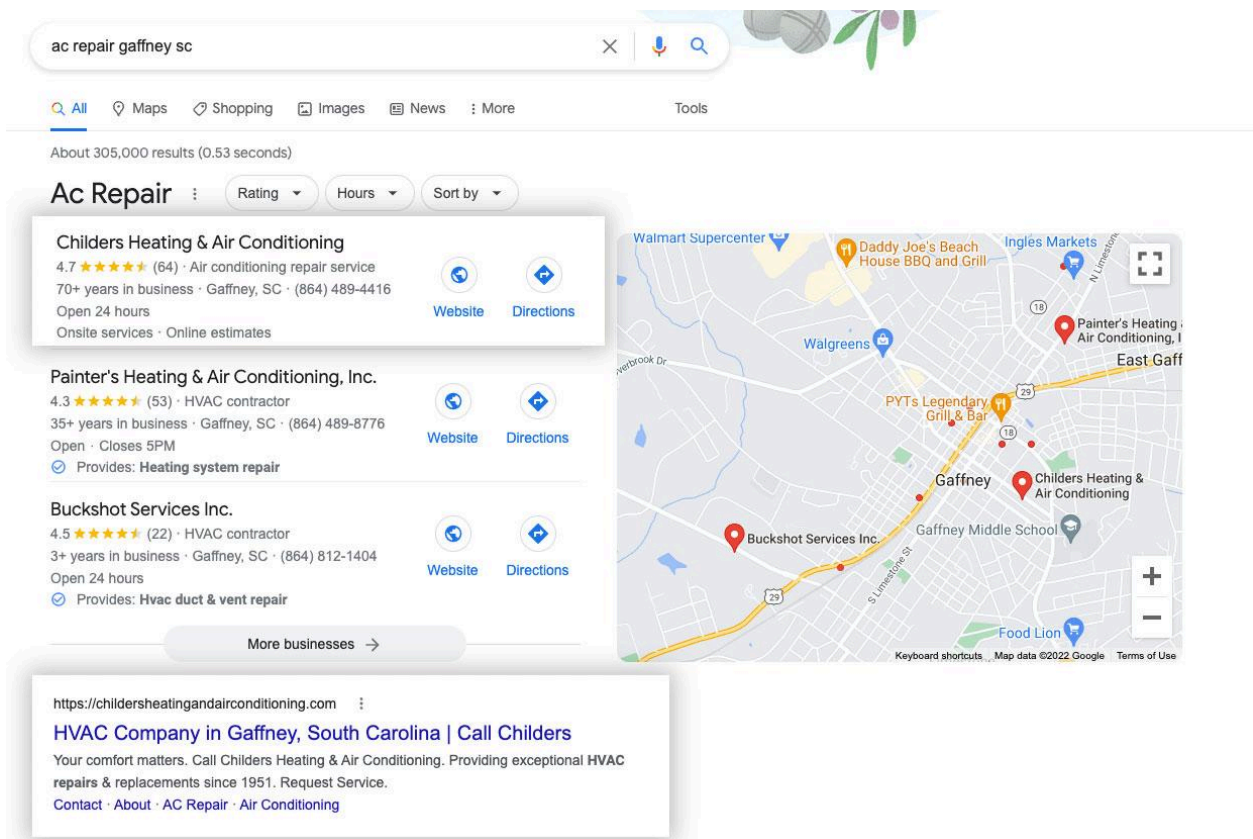
Local SEO is a must for every HVAC or plumbing contractor!

Organic SEO

Organic SEO is targeting those people beyond a 5-mile radius. Organic SEO on Google has a high click-through rate due to its high trust. Because it's not based on paid positioning like ads, people trust it.

A big component to organic search is content. You need to create well-written content that's optimized for the search engines. There's much to this—using the right keywords to reach your target audience, creating just the right type and length of content with the right messaging, implementing technical SEO, starting a backlinking campaign, and more.

It's a lot of work, but don't worry, you don't have to do this. We'll take care of the heavy lifting for you.



When people do not have a direct referral and search Google to find what they need, the results that appear—and what they are most likely to click on—is provided by Organic SEO.

If you would like to learn more about getting found on Google, schedule your free consultation now.

We'll share all your options and other ways to get you found on Google with both Local SEO and Organic SEO.

Questions to ask when hiring an SEO agency or freelancer:

1. What tools do you use to track SEO efforts and rankings?
2. Who will be writing the content for our website?
3. Does your team handle SEO in-house or do you outsource it? (this is important to know)

4. What is your backlinking strategy?

If you need help better understanding the six (6) pillars of SEO and what questions to ask an agency, contact us today at <https://rivaldigital.com/contact>.

Social Media

Consumers use social media, and they use it a lot.

No matter what your feelings are about social media, that's where your prospective clients hang out so having a presence on social media is critical to all home services businesses today.

Consider that the global social network penetration rate is nearly 54%. In the fourth quarter of 2021, there were 1.93 billion daily users on Facebook alone. Your ideal clients are on platforms like Facebook and Instagram, and they range from young to old, professionals, average consumers, or luxury buyers. They are all spending time, and a lot of it, on social media.

Within social media marketing, there are various tasks that need to be completed on a continuous basis that build up an online presence necessary to make a difference. This occurs in several ways.

First, there's organic posting, which is the act of creating posts, interacting with those who respond to those posts, and engaging with your audience in every way possible. Organic posts are seen by your followers and those who are researching your business. They're free to post, but take time to create and optimize for each platform.

Organic posts should tie in with your overall digital marketing strategy, and they take time to craft, but don't worry...we've got your back on social media too!

The second component of social media is paid posts, also known as social ads. These target a very specific target audience, including people who do not follow you. These ads show when people are likely interested in a home service provider like yourself.

Social ads are a highly effective way of targeting people most interested in what you have to offer—they are already looking for that information and a social ad can be dropped in front of the right people at exactly the right time.

How Much Does Digital Marketing Cost?

From a purely marketing standpoint, it's best to use as many different tactics as possible. The more the better. Each one creates a different opportunity for exposure across more channels to be found where your prospective clients are.

You could spend \$2,000 a month or you could spend \$20,000 a month. In marketing, the more you spend the more you get, and to get more you'll need to spend more.

But realistically, not many contractors have unlimited marketing budgets. We'll work within your budget to get you what you need to find success.

We balance the tactics we use carefully, providing as much as we can within your budget with the goal of meeting your needs. This is where strategy comes into play.

The cost you pay depends on who is doing the work. If you do it yourself, you'll spend very little, but you must dedicate plenty of time to gain the knowledge and skill to reach that point.

Once you're knowledgeable, then of course you'll need to actually do all this marketing work. It can be a fulltime job, and then some. That's why successful contractors outsource their marketing while scaling the business.

If you purchase a service from a company that provides a project-based fee then you'll pay \$5,000 to \$20,000 upfront just for the website. Then they'll charge you another \$150-\$250 per hour for every change and update you'll inevitably need over time. How many hours will be needed? Your guess is as good as ours.

And that's just for the website. If you want SEO, advertising, or social media then all of that is extra. With project based companies you'll often be charged a setup fee for each service you add on, typically \$2,000 to \$5,000 each. Once set up, they'll charge thousands of dollars a month in recurring marketing fees.

Or...

Consider a service-based model like Rival Digital's.

In our model you pay nothing up front. No project fee at all. Instead, we spread the cost out over time.

But still, what is the right amount to spend on digital marketing?

Unfortunately the truth is that it depends.

If you come across a "marketer" who quotes you a price without first understanding your situation, your business, and your goals then our advice is walk away from them. How can someone quote you a one solution fits all price when they don't even understand what you're trying to accomplish?

We don't do that. It would be a disservice to the digital marketing profession if we blindly threw out quotes without first doing our due diligence. Every HVAC or plumbing business is unique, and a recommendation that will actually solve your problem requires a conversation.

As a contractor, you understand that you get what you pay for.

In the end, you don't want cheap.

What you want is it done right.

If you're willing to invest just a bit of time to address your marketing problems then we promise it'll be worth it.

Schedule your free 45-minute digital marketing strategy session now at rivaldigital.com/digital-strategy-session/.

We'll talk everything through and get you on the right track to growing your business without wasting more time and money on bad solutions that don't produce the results that you want and need.

What should you expect in your free consultation?

In a no pressure situation, we'll help you discover what's needed for your business to grow through digital marketing. There are many factors to consider, and we'll be asking you a lot of questions during the consultation. Some of them pointed.

We guarantee that no one else in our industry is even thinking the same way we are. We know there's more to this than just buying digital marketing, and we'll invest the time and effort, at no cost to you, to get this right and to get it right upfront.

You'll leave with us fully understanding your company's history, what objectives you have, what you've been doing, and where you need the help most. That will lead to the ideal solutions to get you more leads.

Consultations are hassle-free and no obligation. There is no cost to you except the 45 minutes the meeting takes, and it will be well worth it.

Schedule your free 45-minute digital marketing strategy session now at rivaldigital.com/digital-strategy-session/.

What To Expect When Working With Us

The next step in working with us is to schedule your 45-minute digital marketing strategy session.

The strategy session is a time where we'll ask you a lot of pointed questions about your business and your goals.

Yes, it's an investment of time, but anyone who tries to shortcut this step might as well throw their money away. It's imperative that your agency understand you, your business, and your goals so that they can make the recommendations that are best suited for you.

If you feel we are the right solution for you then we'll schedule a follow up 45-minute video call. Between meetings we'll conduct detailed research on your website, SEO, ads, social media and your competitors. Our research will result in recommendations of what we believe you need to change to make your digital marketing successful.

The goal of this second meeting is for us to present a customized digital marketing solution specifically for you based on what we learned from that first meeting and our subsequent research. We will include options, plans, pricing, and answer every question you have about digital marketing.

During this second meeting we will provide you with an assessment of your current digital marketing efforts, make recommendations on how to achieve your goals, and then talk about the next steps. You'll work closely with our team to get a clear idea of what we can do for you. When you decide to move forward, remember that you'll know exactly what to expect.

When you're ready we'll start the engagement off properly. We'll schedule a kick-off meeting with you and our Operations team. This is a great opportunity to get to know

everyone who will work on your digital marketing and to ask any additional questions you may have.

We'll work closely with you to create strategies for each of the tactics (website, SEO, ads, social media) we'll employ on your campaign. It will be an opportunity for you to learn the purpose and proper execution of each tactic, as well as expected results.

Then we'll get to work.

To do that, we'll need to gain access to your current websites and any analytical tools you have. We'll walk you through that process and make it as painless as possible.

When Will You See Results?

Once we sign an agreement, you will begin to receive communication from the Operations team on a regular basis.

First we'll create a strategy at the tactic level. That takes about two weeks.

We'll simultaneously start designing your website. You'll start to see progress on that within two weeks, and your newly designed website will launch within a couple of months. While that is in the works, we will take over your existing website and make any urgent changes necessary to ensure it's working for you until your new site goes live.

Within a week of signing, we'll begin your SEO and your advertising efforts. Advertising can be up and running within a week or two of signing up with us. SEO is a longer term strategy, but we'll begin incorporating SEO into your new website and we'll start writing the content that your website will need to get found on Google. These steps require collaboration with you, and great communication on your end means that we can begin advertising and SEO for your business quickly.

You can expect to see new SEO pieces ready for you to read after a month. Once your new website launches, we will publish these pieces on your website, get backlinks to them, and monitor their performance. We're confident you will appreciate the quality writing and SEO right from the start.

Your local SEO will be developed and optimized for you within your first month of signing with us, as well. It's so important that we do not want to wait.

As for your social media posts, those will begin within two weeks. Social media always relies heavily on collaboration. We believe it is vital to listen to and implement our clients' opinions.

Communications Plan

We know that communication is crucial. With larger agencies, it's nearly impossible to find a phone number on their website or talk to an in-house staff member immediately. That's unacceptable.

You can always reach us at 800.674.9823.

We do not believe in forcing you to use a trouble ticket system. We know that's difficult, too.

Instead, we will reach out to you directly in whatever communication preference you choose—email, text, call, or whatever works for you.

You'll have a dedicated account manager who is always available to take your requests. We're here for you.

Each quarter you'll have a scheduled strategy meeting with the Operations team to review past performance and expected performance for the next quarter.

In between these quarterly meetings you can also request additional meetings as you need. Your account manager will set up meetings with any of the department leads or specialists to discuss any in-depth questions you have.

We know communication is important. That's why we focus on it nonstop. It matters to you so it matters to us.

Your Best Next Step...

If you've made it this far, congratulations.

Most people do not have the perseverance or desire to change their current marketing situation enough to read through a document like this, but you do.

Digital marketing is a highly targeted way of getting in front of your ideal prospective clients. It will get you more leads, allowing your business to grow and will help you to fulfill your mission. Digital marketing allows you to grow your top-line revenue and increase the lifetime value of each of your clients.

If the goals within this document speak to you, the next step is for you to meet with our founder, Eric Thomas. Our founders have decades of business experience, digital marketing expertise, and they will meet with you to provide their personalized recommendations to help grow your business and so that you can fulfill your goals and your dreams.

Schedule your free 45-minute digital marketing strategy session now at rivaldigital.com/digital-strategy-session/.

It's free, confidential, and will be conducted online at a time that's convenient for you. The value you get from this consultation is priceless. It will be worth your time.

About Us

Rival Digital is a world-class digital marketing agency that specializes in HVAC and plumbing marketing.

We work with contractors across the United States and Canada to deliver fully integrated digital marketing campaigns. Our services comprise every aspect of digital branding, marketing, and advertising.

We are a 100% digital-focused company with expertise and a proven strategy that ensures success for contractors we partner with generating new business.