

# Sales & Marketing Strategy Template

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## For Trades and Service Businesses

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## Introduction

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Marketing and sales in the trades industry is different from any other business sector. Your customers make decisions based on trust, reliability, and proven expertise – not flashy advertising or smooth sales pitches.

After 23 years of coaching trades and service businesses, I've developed this comprehensive template that addresses the unique challenges you face: long sales cycles, price-sensitive customers, seasonal fluctuations, and the need to build trust quickly with people who may never have met you before.

This isn't about becoming a "salesy" person. It's about systematically building trust, demonstrating value, and making it easy for customers to choose your services over the competition.

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## Section 1: Market Analysis and Positioning

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### Understanding Your Market

**Customer Segmentation Exercise:**

**Residential Customers:** - [ ] **Demographics:** Age, income level, homeownership status - [ ] **Psychographics:** Values, lifestyle, decision-making process - [ ] **Pain Points:** What problems do they need solved? - [ ] **Buying Triggers:** What motivates them to take action? - [ ] **Seasonal Patterns:** When do they typically need your services?

**Commercial Customers:** - [ ] **Business Types:** Offices, retail, industrial, hospitality - [ ] **Decision Makers:** Who actually makes the purchasing decisions? - [ ] **Budget Cycles:** When do they plan and approve expenditures? - [ ] **Compliance Requirements:** What regulations must they meet? - [ ] **Maintenance Schedules:** How do they plan ongoing services?

**Emergency/Urgent Customers:** - [ ] **Common Emergencies:** What situations create urgent need? - [ ] **Response Expectations:** How quickly must you respond? - [ ] **Price Sensitivity:** How does urgency affect price acceptance? - [ ] **Follow-up Opportunities:** What additional services might they need?

## Competitive Analysis Framework

**Direct Competitors Analysis:** - [ ] **Services Offered:** What do they do that you also do? - [ ] **Pricing Strategy:** How do their prices compare to yours? - [ ] **Marketing Messages:** What promises do they make? - [ ] **Strengths:** What do they do particularly well? - [ ] **Weaknesses:** Where do they fall short? - [ ] **Customer Reviews:** What do customers say about them?

**Indirect Competitors Analysis:** - [ ] **DIY Solutions:** What can customers do themselves? - [ ] **Alternative Solutions:** What other ways can they solve their problem? - [ ] **Substitute Services:** What different approaches meet the same need?

## Your Unique Value Proposition

**Value Proposition Development:** - [ ] **Core Expertise:** What are you exceptionally good at? - [ ] **Unique Processes:** What do you do differently from competitors? - [ ] **Guarantees:** What promises can you make that others can't? - [ ] **Experience:** How does your background benefit customers? - [ ] **Results:** What specific outcomes do you deliver?

**Value Proposition Template:** "For [target customer], who [customer situation/problem], our [service] provides [unique benefit] because [reason to believe/proof]."

**Example:** "For busy homeowners who need reliable plumbing repairs, our emergency service provides same-day resolution with a 2-year warranty because our certified technicians carry 95% of needed parts and have 15+ years of experience."

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## Section 2: Lead Generation Strategies

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### Digital Marketing Foundation

**Website Optimization Checklist:** - [ ] **Mobile-Friendly Design:** Works perfectly on smartphones - [ ] **Local SEO:** Optimized for "[service] + [city]" searches - [ ] **Clear Contact Information:** Phone number prominently displayed - [ ] **Service Pages:** Dedicated page for each major service - [ ] **Customer Reviews:** Testimonials and review integration - [ ] **Before/After Photos:** Visual proof of your work quality - [ ] **Emergency Contact:** Easy way to reach you for urgent needs

**Google My Business Optimization:** - [ ] **Complete Profile:** All information fields filled out - [ ] **Regular Posts:** Weekly updates about services, tips, or projects - [ ] **Photo Gallery:** High-quality images of your work - [ ] **Review Management:** Systematic approach to getting and responding to reviews - [ ] **Q&A Section:** Proactively answer common questions

**Social Media Strategy:** - [ ] **Platform Selection:** Focus on where your customers spend time - [ ] **Content Calendar:** Regular posting schedule with valuable content - [ ] **Behind-the-Scenes:** Show your team and processes - [ ] **Educational Content:** Tips and advice that demonstrate expertise - [ ] **Customer Features:** Showcase completed projects (with permission)

### Traditional Marketing That Still Works

**Referral System Development:** - [ ] **Customer Referral Program:** Incentives for customer referrals - [ ] **Partner Referral Network:** Relationships with complementary businesses - [ ] **Employee Referral Program:** Rewards for team member referrals - [ ] **Referral Request Process:** Systematic way to ask for referrals - [ ] **Referral Tracking:** System to track and reward referral sources

**Local Networking Strategies:** - [ ] **Trade Associations:** Active participation in industry groups - [ ] **Business Networks:** BNI, Chamber of Commerce, local business groups - [ ]

**Community Involvement:** Sponsorships, charity work, local events - [ ] **Supplier Relationships:** Partnerships with material suppliers - [ ] **Professional Networks:** Relationships with architects, contractors, real estate agents

**Direct Marketing Approaches:** - [ ] **Targeted Direct Mail:** Geographic or demographic targeting - [ ] **Door Hangers:** Neighborhood-specific promotions - [ ] **Vehicle Advertising:** Professional vehicle wraps and signage - [ ] **Yard Signs:** Permission-based signage at job sites - [ ] **Print Advertising:** Local newspapers, trade publications, directories

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## Section 3: Sales Process Development

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### Initial Customer Contact

**Phone Answering Standards:** - [ ] **Answer Within 3 Rings:** Quick response shows professionalism - [ ] **Professional Greeting:** Company name, your name, helpful tone - [ ] **Information Gathering:** Systematic questions to understand needs - [ ] **Appointment Setting:** Clear process for scheduling estimates - [ ] **Follow-up Confirmation:** Confirmation call/text before appointments

**Information Gathering Questions:** - [ ] "What specific problem are you experiencing?" - [ ] "When did you first notice this issue?" - [ ] "Have you had any temporary fixes or previous work done?" - [ ] "What's your timeline for getting this resolved?" - [ ] "What's your budget range for this project?" - [ ] "Who else is involved in making this decision?"

### Estimate and Proposal Process

**Site Visit Preparation:** - [ ] **Professional Appearance:** Clean uniform, company vehicle, professional tools - [ ] **Estimate Kit:** All necessary forms, measuring tools, camera - [ ] **Company Materials:** Brochures, business cards, references - [ ] **Tablet/Smartphone:** For photos, notes, and immediate quote generation

**Estimate Presentation System:** - [ ] **Problem Assessment:** Thorough evaluation and explanation - [ ] **Solution Options:** Present 2-3 different approaches - [ ] **Pricing Structure:** Clear breakdown of labor, materials, and timeline - [ ] **Value Justification:** Explain why your solution is worth the investment - [ ] **Next Steps:** Clear process for moving forward

**Three-Tier Pricing Strategy:** - [ ] **Basic Option:** Meets minimum requirements at lowest price - [ ] **Recommended Option:** Best value with quality materials and warranty - [ ] **Premium Option:** Top-tier solution with all upgrades and extended warranty

## Closing and Contract Process

**Objection Handling Preparation:** - [ ] **Price Objections:** "I need to think about it" / "It's more than I expected" - [ ] **Timing Objections:** "We're not ready to start yet" - [ ] **Authority Objections:** "I need to discuss this with my spouse/partner" - [ ] **Competition Objections:** "I'm getting other quotes" - [ ] **Quality Concerns:** "How do I know you'll do good work?"

**Closing Techniques:** - [ ] **Assumptive Close:** "When would you like us to start?" - [ ] **Alternative Close:** "Would you prefer to start Monday or Wednesday?" - [ ] **Urgency Close:** "We have an opening next week, but after that it's 3 weeks out" - [ ] **Value Close:** "This investment will save you money in the long run because..."

**Contract and Payment Process:** - [ ] **Clear Contract Terms:** Scope, timeline, payment schedule, change orders - [ ] **Payment Options:** Multiple ways to pay (cash, check, card, financing) - [ ] **Project Timeline:** Specific start and completion dates - [ ] **Communication Plan:** How you'll keep them updated on progress

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## Section 4: Customer Retention and Growth

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### Service Delivery Excellence

**Project Management System:** - [ ] **Pre-Start Communication:** Confirm details before beginning work - [ ] **Daily Updates:** Keep customers informed of progress - [ ] **Clean Work Practices:** Protect customer property, clean up daily - [ ] **Quality Checkpoints:** Regular inspection and quality control - [ ] **Completion Walkthrough:** Review finished work with customer

**Customer Communication During Projects:** - [ ] **Start-of-Day Check-in:** Confirm schedule and any changes - [ ] **Progress Photos:** Document work progress for customer - [ ] **Problem Communication:** Immediate notification of any issues - [ ]

**Timeline Updates:** Proactive communication about schedule changes - [ ]  
**Completion Notification:** Formal handover and final walkthrough

## Post-Project Follow-Up

**Immediate Follow-Up (Within 24 Hours):** - [ ] **Satisfaction Survey:** Simple feedback form or phone call - [ ] **Final Invoice:** Clear, detailed invoice with payment terms - [ ] **Warranty Information:** Written warranty terms and contact information - [ ] **Maintenance Recommendations:** Advice for keeping systems in good condition - [ ] **Referral Request:** Ask for referrals while satisfaction is high

**Long-Term Relationship Building:** - [ ] **Maintenance Reminders:** Seasonal or annual maintenance notifications - [ ] **Educational Content:** Tips and advice via email or newsletter - [ ] **Special Offers:** Exclusive discounts for past customers - [ ] **Holiday Greetings:** Personal touch to maintain relationships - [ ] **Anniversary Follow-Up:** Check on previous work after warranty period

## Upselling and Cross-Selling

**Additional Service Identification:** - [ ] **Related Services:** What other services do customers typically need? - [ ] **Preventive Maintenance:** Ongoing maintenance contracts - [ ] **Upgrades:** Better materials or more advanced solutions - [ ] **Seasonal Services:** Different needs throughout the year - [ ] **Emergency Services:** 24/7 availability for premium customers

**Upselling Strategies:** - [ ] **During Initial Assessment:** Identify additional needs during estimate - [ ] **During Project:** Notice other issues that need attention - [ ] **At Project Completion:** Suggest preventive measures or upgrades - [ ] **Follow-Up Communications:** Seasonal reminders for additional services - [ ] **Annual Review:** Comprehensive assessment of all systems

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## Section 5: Marketing Measurement and ROI

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### Key Performance Indicators (KPIs)

**Lead Generation Metrics:** - [ ] **Total Leads per Month:** Track all inquiries from all sources - [ ] **Cost per Lead:** Marketing spend divided by number of leads - [ ] **Lead**

**Source Tracking:** Which marketing efforts generate most leads - [ ] **Lead Quality Score:** Percentage of leads that become customers - [ ] **Response Time:** How quickly you respond to inquiries

**Conversion Metrics:** - [ ] **Estimate-to-Sale Conversion Rate:** Percentage of estimates that become jobs - [ ] **Average Transaction Value:** Mean value of completed projects - [ ] **Sales Cycle Length:** Time from first contact to signed contract - [ ] **Win Rate by Lead Source:** Which sources convert best - [ ] **Seasonal Conversion Patterns:** How conversion rates vary by time of year

**Customer Retention Metrics:** - [ ] **Repeat Customer Rate:** Percentage of customers who use you again - [ ] **Customer Lifetime Value:** Total revenue from average customer relationship - [ ] **Referral Rate:** Percentage of customers who refer others - [ ] **Customer Satisfaction Score:** Formal measurement of satisfaction - [ ] **Complaint Resolution Rate:** How effectively you handle problems

## ROI Tracking System

**Marketing Investment Tracking:** - [ ] **Digital Marketing Costs:** Website, SEO, online advertising, social media - [ ] **Traditional Marketing Costs:** Print ads, direct mail, vehicle advertising - [ ] **Networking Costs:** Membership fees, event attendance, sponsorships - [ ] **Referral Program Costs:** Incentives and rewards paid out - [ ] **Time Investment:** Hours spent on marketing activities

**Revenue Attribution:** - [ ] **Source Tracking:** Which marketing effort generated each customer - [ ] **Campaign Performance:** ROI of specific marketing campaigns - [ ] **Channel Effectiveness:** Which channels provide best return - [ ] **Seasonal Performance:** How different times of year affect ROI - [ ] **Long-term Value:** Customer lifetime value by acquisition source

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## Section 6: Seasonal and Economic Adaptation

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### Seasonal Marketing Strategies

**Peak Season Preparation:** - [ ] **Capacity Planning:** Ensure adequate staffing for busy periods - [ ] **Premium Pricing:** Higher prices during high-demand periods - [ ] **Advance**

**Booking:** Encourage customers to book early - [ ] **Referral Incentives:** Extra rewards during peak season - [ ] **Emergency Availability:** Premium pricing for urgent needs

**Off-Season Strategies:** - [ ] **Maintenance Contracts:** Ongoing revenue during slow periods - [ ] **Indoor Projects:** Services that aren't weather-dependent - [ ] **Training and Development:** Use slow time for skill building - [ ] **Equipment Maintenance:** Service and repair tools and vehicles - [ ] **Marketing Investment:** Prepare for next busy season

## Economic Adaptation

**Recession-Proof Strategies:** - [ ] **Essential Services Focus:** Emphasize necessary vs. optional services - [ ] **Payment Plans:** Make services more affordable with financing - [ ] **Value Positioning:** Emphasize long-term savings and benefits - [ ] **Maintenance Emphasis:** Help customers maintain rather than replace - [ ] **Emergency Services:** People always need urgent repairs

**Growth Period Strategies:** - [ ] **Premium Services:** Offer high-end options when budgets are loose - [ ] **Expansion Services:** Help customers with improvement projects - [ ] **Capacity Building:** Invest in equipment and staff for growth - [ ] **Market Share Growth:** Aggressive marketing to capture more business - [ ] **Strategic Partnerships:** Collaborate with other businesses for larger projects

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## Implementation Timeline

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### Month 1: Foundation Building

- [ ] Complete market analysis and competitive research
- [ ] Develop your unique value proposition
- [ ] Set up basic tracking systems for leads and conversions
- [ ] Optimize Google My Business listing
- [ ] Create or update website with clear service information

### Month 2: Process Development

- [ ] Document and refine your sales process



- ☐ Create estimate templates and pricing structures
- ☐ Develop objection handling scripts and closing techniques
- ☐ Set up customer communication systems
- ☐ Implement basic follow-up procedures

### Month 3: Marketing Launch

- ☐ Launch referral program with existing customers
- ☐ Begin systematic networking and relationship building
- ☐ Start content marketing (blog posts, social media, newsletters)
- ☐ Implement direct marketing campaigns in target areas
- ☐ Track and measure all marketing activities

### Month 4-6: Optimization and Growth

- ☐ Analyze performance data and adjust strategies
- ☐ Expand successful marketing channels
- ☐ Eliminate or modify underperforming activities
- ☐ Develop advanced services and upselling opportunities
- ☐ Build long-term customer retention systems

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## Conclusion

Successful marketing and sales in the trades industry isn't about being pushy or using high-pressure tactics. It's about building trust, demonstrating value, and making it easy for customers to choose your services.

The strategies in this template have been proven effective across hundreds of trades and service businesses. The key is to implement them systematically and consistently, measuring results and adjusting based on what works in your specific market.

Remember: **Your reputation is your most valuable marketing asset.** Every job you complete, every customer interaction, and every problem you solve is a marketing

opportunity. Focus on excellence in service delivery, and the marketing becomes much easier.

Start with the strategies that align best with your current capabilities and market situation, then gradually expand your marketing efforts as you see results and build confidence.

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## About Steven Rouget

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Steven Rouget is an ActionCOACH Business Coach with 23 years of experience helping trades and service business owners develop effective marketing and sales systems. He specializes in creating systematic approaches that generate consistent leads, improve conversion rates, and build long-term customer relationships.

Steven's practical approach focuses on strategies that work in the real world of trades businesses – where trust, reliability, and proven expertise matter more than flashy marketing campaigns.

**Ready to build a systematic approach to marketing and sales?**

**Contact Steven Rouget:** 📞 0412 351 755

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