



SERVICE DIRECT

# Marketplace

## Setting Yourself Up For Success

In this guide we'll help you get the most out of the Service Direct Marketplace program and highlight what it can do for you.

By optimizing your Account and following these best practices, you will get more Leads, win more clients and see your return on investment.

# What to Expect

Service Direct Marketplace connects service businesses with New Potential Customers in real-time. Leveraging our proprietary pay per call platform, Marketplace offers a flexible, low-risk, and cost-effective way to generate quality, exclusive Leads in your area.

Keep in mind that not every Lead is a Billable Lead, and not every Billable Lead will turn into a Booked Appointment. Your performance results will vary based on the services your offer, your ability to consistently answer the phone and turn a Potential Customer into an actual customer, as well as the level of competition in your local Service Area.

## UNDERSTANDING BILLABLE VS. NON-BILLABLE LEADS

**A Billable Lead** is a Phone Call Lead or Form Lead generated by a Service Direct Campaign that is a New Potential Customer.

**A New Potential Customer** is someone in your Service Area who is seeking services that typically align with your Service Category.

**A Non-Billable Lead** is a Phone Call Lead or Form Lead generated by a Service Direct Campaign that is not a New Potential Customer. Examples of Non-Billable Leads are existing customers, job seekers, people outside your Service Area, solicitors, people seeking services not normally offered by your industry, etc.

# 50-60%

Approximately 50% to 60% of Billable Leads turn into Booked Appointments, depending on the Service Category.

Learn More: [Billable and Non-Billable Leads](#)

The mySD Platform enables you to manage your Campaigns and see your Leads in real-time.

		9:47 am 03/19/19	Booked Appt. Job Won	Marketplace - HVAC	Stevie Ray Vaughan	(512) 456 6677	2:32	\$105.00	\$875.00
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Listen to Call Last played 11/02/20 2:32pm by leader@customeremail.com

1:19 / 2:32
Download Call

FOLLOW-UP STARRED

### Lead Progress and Revenue

Managing Progress helps us optimize your Campaigns and adding Revenue helps show your ROI.

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Call Answered	Booked Appointment	Job Won	Revenue	
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="\$875.00"/>	<input type="button" value="SAVED"/>

Lead Status  
Billable

QUALITY CHECK

Lead Review  
[Submit for Review](#)

### Lead History

[Add Note](#)

Quality Check Performed: This Lead was automatically reviewed by our system.

06/25/19 11:28 by Service Direct Quality Check

Lead opened for the first time.

06/25/19 11:28 by leader@customeremail.com

		2:15 pm 03/18/19	Unmanaged	Marketplace - Plumbing	Caller from Austin TX	(512) 123 4567	0:25	\$72.00	\$375.00
		1:43 pm 03/18/19	Booked Appt. Job Won	Marketplace - Plumbing	Mick Jagger	(512) 887 3467	2:17	\$84.00	\$465.00
		8:22 am 03/18/19	Job Won Reviewed Billable	Marketplace - HVAC	Tom Petty	(512) 123 3467	12:18	\$105.00	\$1,700.00
		5:04 am							

# Quick Tips for Success

## Responsiveness is Critical

The ability to answer the phone or respond to Form Leads quickly is critical to success. When it comes to missed calls, 80% of callers will not leave a message, and 85% of unanswered calls never call back. Prepare your team to respond to missed Leads promptly.

## Track Lead Progress

Track Lead Progress for Billable Leads in the [mySD Lead Manager](#) to see your Lead Performance Metrics and to improve our ability to optimize your Campaigns for quality Leads.

## Don't Pause Your Campaigns Too Frequently

Sometimes it makes sense to Pause your Campaigns but doing so too frequently will negatively impact the performance of your Campaigns. If you do Pause a Campaign, then be sure to set Enable For Future Date.

Learn More: [Controlling Lead Volume](#)

## Confirm Your Campaign Settings

Customize the settings for each of your Campaigns based on your business needs. Your [Campaign Settings](#) directly impact the volume of Leads you receive, the time of day when you receive them, and where the Leads will be delivered (i.e. the person responsible for answering the phone and/or checking emails).

## Monitor Performance and Adjust Cost Per Lead

The initial [Cost Per Lead](#) you set for each Campaign significantly impacts performance, and may need to be adjusted based on your Campaign's Service Category, Service Area and level of competition in your area. If you aren't receiving Leads within 7 Days, we recommend increasing your Cost Per Lead.

**servicedirect** Dashboard Leads Campaigns More [LOGOUT](#)

Welcome Awesome Company

5 Leads Marked for Follow-Up **845** Billable Leads All Time **224** Billable Leads Last 90 Days **568%** Managed ROI Last 90 Days **78%** Confidence **91%** Call Answered Rate Last 90 Days **8%** Confidence **67%** Job Won Rate Last 90 Days **82%** Confidence

**Lead Manager Snapshot**

Below are just your most recent Billable Leads. Go to your [Lead Manager](#) to see all your Leads and filter them by type.

Date	Progress	Campaign	Name / Caller ID	Contact Details	Duration	Cost	Revenue
11:33 pm 03/15/19	Call Answered	Marketplace - HVAC	Anetha Franklin	(512) 123-4567	3:14	\$94.00	---
9:47 am 03/15/19	Booked Appt. Job Won	Marketplace - Plumbing	Stevie Ray Vaughan	(512) 456-6677	2:32	\$78.00	\$875.00
2:15 pm 03/15/19	Unmanaged	Marketplace - HVAC	Ferni Filla Jr.	nicocustomer@gmail.com (512) 123-4567	---	\$94.00	---
1:43 pm 03/15/19	Booked Appt. Job Won	Marketplace - HVAC	Mick Jagger	(512) 887-3467	2:17	\$66.00	\$465.00
8:22 am 03/15/19	Job Won Renewed Estimate	Marketplace - Plumbing	Tom Petty	(512) 123-3467	12:18	\$78.00	\$1,700.00
5:04 pm 03/15/19	Job Won	Marketplace - HVAC	Unknown Caller	(512) 713-3009	2:45	\$94.00	\$850.00
10:19 am 03/15/19	Booked Appt. Job Lost	Marketplace - HVAC	Malutna Gandhi	(512) 988-0987	1:56	\$94.00	\$0.00
9:17 am 03/15/19	Unmanaged Under Review	Marketplace - HVAC	Biggie Smalls	thekingofev@thecklyn.com	---	\$94.00	---
3:07 pm 03/15/19	Booked Appt.	Marketplace - Plumbing	Nina Simone	(512) 321-0987	4:18	\$78.00	---
4:22 pm 03/14/19	Booked Appt. Job Won	Marketplace - HVAC	Chauka Khan	(512) 988-0987	5:26	\$94.00	\$235.00

[Want More Leads? Increase the Cost Per Lead in your Campaigns Manager.](#) [VIEW ALL LEADS](#)

**Current Balance**

CURRENT BILLING CYCLE

**\$140** Current Balance

\$184 Lead Cost - \$44 Lead Credit \$0 Unpaid Statement

BILLING THRESHOLD

**\$140 / \$100**

Your credit card ending in 1234 is billed each time your Current Balance meets your Billing Threshold of \$100 or at the end of each month if you have not reached your Threshold.

[Request Billing Threshold Change](#) - [Learn More about When You Will Be Billed](#)

RECENT STATEMENTS

1988418 03/22/20 Card - 1234 \$316 Unpaid [PAY NOW](#)

Leads Generated (03/17/20 to 03/22/20)

1988457 03/16/20 Card - 1234 \$100 Paid

Leads Generated (03/02/20 to 03/16/20)

**Campaigns Manager Snapshot**

ENABLED CAMPAIGNS

Ordered by Most Leads Last 30 Days

Marketplace - HVAC

**29 Leads** Last 30 Days **\$94.00** Cost Per Lead [View in Campaigns Manager](#)

Marketplace - Plumbing

**23 Leads** Last 30 Days **\$78.00** Cost Per Lead [View in Campaigns Manager](#)

[VIEW ALL CAMPAIGNS](#)

**Lead Manager**

Filter Search Default View

Showing 1-25 of 74 Billable Leads from Last 30 Days

[View Performance](#) for these Leads

2:18 pm 10/27/20

**Tom Petty**  
(512) 988-0987

Progress: Booked Appt., Job Won  
Campaign: Different Business  
Duration: 2:32  
Cost: \$53.00  
Revenue: \$1400.00

Listen to Call

1:54 / 2:32

1x 10s 10s

[Download Call](#)

**568%**

Managed ROI Last 90 Days

78% Confidence

**91%**

Call Answered Rate Last 90 Days

86% Confidence

# mySD Key Features and Benefits

## MANAGING YOUR LEADS

### Track Lead Progress

Review and manage your Leads in your mySD Lead Manager. You can mark a Lead with Call Answered, Booked Appointment, Job Won, and Revenue data. The more Leads you manage, the more accurate your Lead Performance Metrics will be and the better you can understand your Campaigns' ROI. Based on the performance data we can better optimize your Campaigns to generate more profitable Leads.

Learn More: [Managing Your Leads](#)

**Lead Progress and Revenue** <sup>1</sup>

Managing Progress helps us optimize your Campaigns and adding Revenue helps show your ROI.

✓

Call Answered

Yes  
 No

✓

Booked Appointment

Yes  
 No

✓

Job Won

Yes  
 No

✓

Revenue

\$875.00

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**Lead History** +

Note added: Appointment set for next week. Needs pricing for full AC install and replacement  
06/25/19 11:28 by leader@customeremail.com

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Lead opened for the first time.  
06/25/19 11:28 by leader@customeremail.com

### Submit Leads for Review

You should only pay for Lead from New Potential Customers and our Lead Review process ensures that you can dispute Leads you believe should be Non-Billable.

**You are able to Submit A Lead for Review if...**

- The call has been answered.
- The Lead was generated in the Last 7 Days.
- Call Recording was enabled at the time the Phone Lead was received.
- The Lead has not already been Submitted for Review.

Learn More: [Submitting a Lead for Review](#)

Learn More: [Billable vs Non-Billable Leads](#)

### Call Insights Service

Enroll in our Call Insights Service and we will proactively review all your Leads to save you time and money and ensure you're seeing useful Lead Performance Metrics.

Learn More: [Call Insights Service](#)

### Understanding Lead Performance Metrics

Gain valuable insights into your Campaign performance, Lead quality, and your return on marketing investment with Lead Performance Metrics. Lead Performance Metrics also influence the way we optimize your Campaigns. These additional data points help us focus on generating more of the types of Leads that are working for you.

**Some key metrics you are able to see in real-time:**

- Call Answer Rate
- Booked Appointment Rate
- Job Won Rate
- Revenue
- Return On Investment

Learn More: [Lead Performance Metrics](#)

**Lead Performance Metrics for Current Filters** ✕

Showing Metrics for **100 Billable Leads** in Service Category **Plumbing** from **Last 30 Days**

Note: The more Leads you Manage, and the more completely you Manage them, the more accurate and useful your Performance Metrics become. Adjust your Lead Filters, such as date range, to see more broad or more granular Metrics.

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**Calls Answered**

Good Confidence (84%)

Confidence based on 84 Leads with Calls Answered Managed out of the 100 Leads you are filtering by. <sup>1</sup>

**66**

Calls Answered

**18**

Calls Not Answered

**89%**

Call Answered Rate <sup>1</sup>

**93**

Likely Calls Answered <sup>1</sup>

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**Booked Appointments**

Good Confidence (81%)

Confidence based on 81 Leads with Booked Appointments Managed out of the 100 Leads you are filtering by. <sup>1</sup>

**58**

Booked Appointments

**23**

Did Not Book

**72%**

Booked Appointment Rate <sup>1</sup>

**64**

Likely Booked Appointments <sup>1</sup>

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**Jobs Won**

Good Confidence (90%)

Confidence Based on 90 Leads with Jobs Won Managed out of the 100 Leads you are filtering by. <sup>1</sup>

**49**

Jobs Won

**41**

No Job

**54%**

Jobs Won Rate <sup>1</sup>

**52**

Likely Total Jobs Won <sup>1</sup>

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**Revenue, Cost, Return On Investment**

Good Confidence (88%)

Confidence Based on 88 Leads with Revenue Managed out of the 100 Leads you are filtering by. <sup>1</sup>

**\$35,184**

Revenue from 88 Leads with known Revenue

**\$4,510**

Cost from 88 Leads with known Revenue

**680%**

Your ROI from 88 Leads with known Revenue

**\$30,674**

Your Profit from 88 Leads with known Revenue <sup>1</sup>





## GETTING HELP

There are several ways to get help with your Service Direct Marketplace Account:

### Help Chat

Click the chat bubble in the lower right corner of any page in mySD and the Help Chat Bot will guide you through a series of questions and answers. If the Help Bot cannot answer your question, you will be given the option to open a Support Request and a member of our Team will assist.

### Help Center & Video Library

Our robust [Help Center](#) is available 24/7 and features tutorials, videos, best practices, and provides answers to most questions.

### Email Support

Submit a [Support Ticket](#) in the Help Center or email us at [support@servicedirect.com](mailto:support@servicedirect.com) at any time.

### Selected Videos

