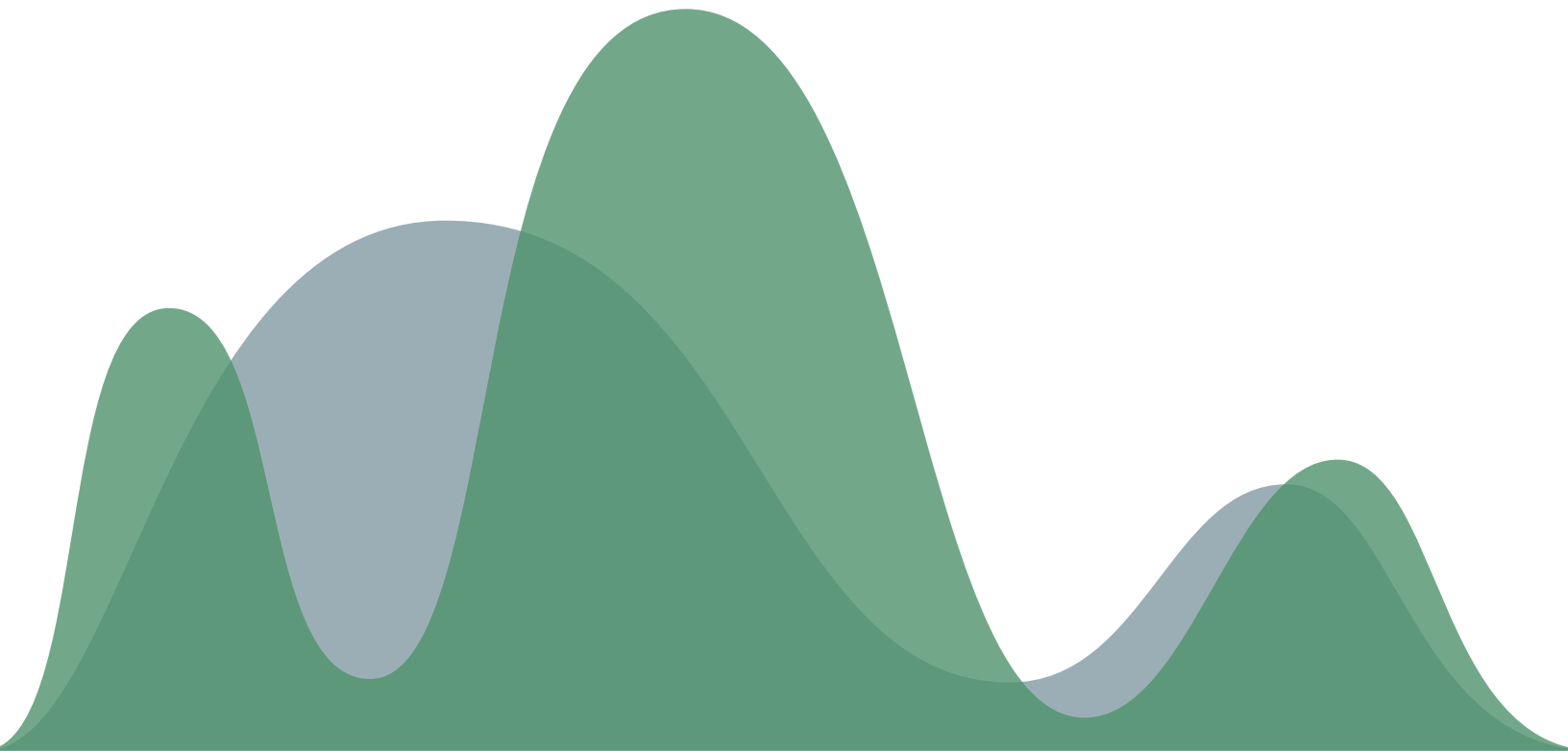


CASE STUDY

THE WINDOW SOURCE OF ARKANSAS

How a New Referral Program Helped Boost Revenue
by 68.9% in 1 Year



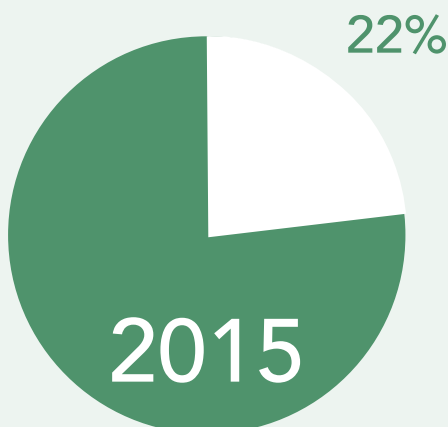
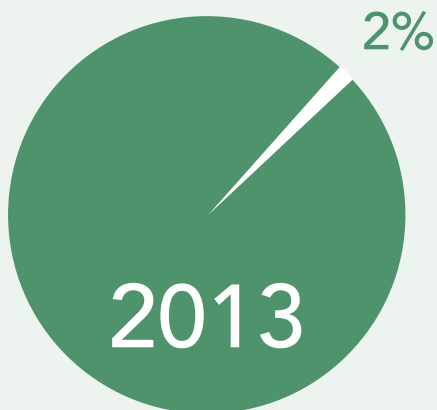


AN INABILITY TO TRACK REFERRALS

Referrals are the lifeblood of any home improvement business. They are testimonials from a homeowner to friends and family about the services provided. According to a research study from Texas Tech, 83% of consumers are willing to refer after a positive experience, yet only 29% actually do. People like to get referrals from those they know, too. 92% of respondents trusted recommendations coming from people they knew, according to Nielsen.

Morgan Wiles, CEO of The Window Source of Arkansas, certainly knows the value of having a referral program in place. "A large percentage of our customers were from pay-per-lead programs, but we knew referrals were a better lead source. We would do call campaigns where we'd reach out to past customers and offer them a \$100 incentive but we couldn't keep track of the follow-up or the results," said Wiles.

LEAD SOURCE: REFERRALS



REFERRAL SELLING IN 3 STAGES

The company had already implemented improveit 360 as their CRM and business management platform so they reached out to their account manager to create a referral program within the system. "I needed a referral call campaign that would allow us to automate how we bring in new leads and be able to track its effectiveness," said Wiles.

The improveit 360 account manager set up their referral plan with a three-stage call requirement to ensure follow-up. Once every customer's project was complete, they are automatically scheduled for a call two weeks later. This first stage is the Intro Call. "Our reps talk about the referral plan and ask the customers if they have family or friends who could be referred to us," stated Wiles. If the customer has no one in mind at the time, they are cycled back into the Intro Call stage. "We agree to reach back out to them in 60 to 90 days to see if they have referrals."

If the customer knows someone, they are moved into the second stage – Referral Collection. "We give them time to gather contact information and call them back at an agreed upon time. It also allows them time to warm up the person they are referring to us," said Wiles.



Finally, in the third stage of the campaign, call center reps reach out to the referral. "In the Ready-to-Set stage, we contact our list of referrals. And if they become customers they are moved over, full-circle, into the Intro Call phase to ask for referrals. It keeps all our prospects in a loop and prevents anyone from slipping through the cracks," said Wiles.

REFERRALS MEAN MORE REVENUE

As that Texas Tech study revealed, over 70% are not giving out referrals but want to do so. Having an automated referral program with constant and consistent reminders makes it easier for people to provide them. "With the call campaign we now have within our system, we have added an additional \$350,000 in sales monthly," said Wiles.

In 2013, The Window Source of Arkansas was tracking referrals as 2% of all of their lead sources. "By 2015, 22% of all our leads came from Referrals. We increased sales revenue by 68.9% from 2014 to 2015," added Wiles. They have since opened an entire division devoted to handling only referral calls.

"I expected to get more efficient in our sales and marketing process because of improveit 360. But with the reporting and marketing capabilities of the system, we have excelled more than I even expected!" They are even considering adding to the effectiveness of their marketing. "We're thinking of introducing automated e-mails and text messaging to get even more from our referral program."

ABOUT WINDOW SOURCE

Located near Little Rock, The Window Source of Arkansas provides customers with the best value when purchasing replacement windows for their home. Their mission is to give homeowners an easy and pleasant shopping experience. Every Window Source job comes with a written best price guarantee. They specialize in windows to ensure sure every project is done right the first time. The Window Source of Arkansas offers a strong line of replacement windows that are energy efficient, warranted, and NFRC-labeled.

ABOUT IMPROVEIT 360

improveit 360 is the only business management platform designed to eliminate chaos, lower costs and increase profit. With improveit 360, home pros generate and close more deals by automatically nurturing leads until they buy, track all customer interactions, and manage leads, sales, and projects from one central location. With best-in-class dashboards and reports, owners get a 360 degree view of their operation for better decision-making. This powerful system is web-based with no software to install or upgrade. The mobile apps give your team remote access to vital information on a smartphone, laptop or tablet.