

-- Speaker 1 00:00:05 Welcome to the clear impact podcast brought to you by PGT university. Thanks for joining us today. My name is Sherry Conner and I am your host

Speaker 0 00:00:20 And it's all at no cost.

Speaker 1 00:00:21 I was just about to ask. So what's the fee for that? Is there a monthly subscription or wow. Today on the clear impact podcast, we continue our conversation with Josh Soto, a digital marketing specialist here at PGT innovations. We learn about the lead match system that we designed and built to help our dealers. We learn how this proprietary system works and how our dealers can fully leverage this amazing free resource. We also learn a little bit more about Josh's history and we even chat about what kinds of exercise is the best kind of exercise. I hope you enjoy today's show. So we're back with Josh Soto and we're going to continue our conversation around digital marketing. Thanks for joining us again, Josh, of course. Good to have you today. So Josh is a digital marketing specialists. One of the things that we want to talk about on today's episode is we want to talk about lead match. I don't know anything about lead match. I could guess that it means something where people who are trying to buy windows and doors come to us, and then we spilled those leads out to various dealers. Is that,

Speaker 2 00:01:31 That is pretty accurate. Oh yeah. More, more accurate than not. So yes, that's a pretty over, it's a oversimplification of it, but yes, of course that's, that's pretty much what it is. Okay. So how does it actually work? So the concept of lead match, the whole goal of it is to connect our end consumers. So our homeowners, our general contractors or whomever who needs windows from us, we try to connect them with, with the proper dealer or distributor or whomever that can, can help them as quickly as possible. That's really at its core. That's what it is. And so if you want to get PGT, I'll take you through what I call the journey of a lead. I do like do this presentation a lot. Okay. Um, so what I do when I'm more into being a new dealer is to take them on a journey of the latest, okay, this is where it all starts.

Speaker 2 00:02:12 Um, so I go to a PGT windows.com. I click on the word to buy button. And from there I can do a couple of different things. I can fell, want it to look at different dealers. I can scroll down and I can either put in my zip code or I can select to be searched by my location on I get geo that way. I look at dealers in my area, you know, for the specific brands, if I'm on PGT site, then I look at PGT dealers that are selling PGT windows in my area. From there, I can call them, I can get a quote directly from them. Um, I can get directions to how to get there. So we kind S w we can give them that visibility that way, the other way that they can get a lead, um, or how we can help our consumer is, um, instead of scrolling down and entering your information, uh, and picking from a list, there's actually just a form there, you enter what you need.

Speaker 2 00:02:55 I need these windows for residential, or need these windows for, you know, a new commercial I'm you fill in all the questions, and then we'll map them to a dealer in their area. Um, we do it to up to three days up to three dealers. Um, so we don't force the business upon anybody want to do it. We just look for, there's only one dealer in that area that can help this consumer. Then that's the only person that gets that. And so that's what we do. Uh, that's the dealer locator side of it. So as long as you're on the dealer locator, you're eligible to receive leads from us. Um, the other side of that, the backend side of that is lead match. And so lead match the way you described. That's pretty much what it is. It's a housing for all of these leads and it's a custom CRM.

Speaker 2 00:03:31 So it's a customer relationship management system that we're developing and building in-house specifically to support our dealer network. The analogy I like to use is, you know, when we get these leads, they go into a mailbox in order to get these leads. You know, a dealer just needs to register for lead match and get access from your immediately have access to all the leads that you have in there. It's pretty, it's pretty straightforward when a dealer registers with lead match, you know, I signed them up at Sam emails and Hey, welcome aboard. And then, um, they can go in and --

-- they have a few things that they can do. They can, uh, right when they log in, they see all their leads. They could see what their status is. If it's new contacted, sold, what have you, um, they can con they open up that the, the lead.

Speaker 2 00:04:10 And then there's a thing we ask, uh, 10 to 12 questions and all that gets compiled into, you know, a format so they can look at it, they get contact information. Um, the kinds of things that the end consumer is looking for, the different benefits that they find interesting when they're looking to buy all those fun things. So if you're a dealer or a sales rep, you could look at that and say, Oh, I know what they're looking for. I know how to have a conversation with them. And I know if they prefer to be emailed or called, and so you can reach out to that, to that person. And then from there, you just, you work the lead from within there. So you can change the status, um, you know, contact it, you know, set appointment and all these different things and kind of move the customer along that journey and do it all from within lead match.

Speaker 2 00:04:48 Um, on the other side of that, say, if you are in lead match and you're a business owner, or you're, you know, you're a bigger operation, so you have your, you have a sales manager and different sales reps. Um, we actually have it set up. So if you're a sales manager, you can log in, see that lead and then assign that lead to different, um, sales reps that you have. And so when you create a little account for that person, when they log into lead match, they only see the leads that you send them. And so it's a pretty neat tool and it allows it's very, very simple and straightforward. The only two things that you can do on their other service at yourself, or send it to your sales rep. If you're a distributor, you can actually send it instead of sending it to sales reps, you can send it to a third party dealer or an installer, or, you know, and bring them on board that way.

Speaker 2 00:05:28 Um, it was really neat about it is that, you know, say if I'm a business owner and I have three sales reps that I want to send to the same, the same lead to I, when they, when they make notes in that lead, or they change the status, I can see what all of them are doing in there, but they only see what they're, what they are doing. And so you can kind of, it gives you a very cool, um, high-level view of how your team is managing these leads. And it gives you some, you know, it gives you put some, some tools in your, in your toolbox. Um, Speaker 1 00:05:52 No cost. I was just about to ask. So what's the fee for that? Is there a monthly Sanofi or, wow,

Speaker 2 00:05:59 No fee. We just ask that when you service the lead, you update the statuses, um, because when you update the status that tells us a few things, it tells us that the consumer's needs are being met and that we're sending you high quality leads. And like, we work very hard to make sure that you're getting a very high quality lead. And so if you get a lead that you can't service, we give you different statuses that reflect that if the job is too far from you, you can change that status. And then we'll remove it from your dashboard and try to get it into the hands of someone that can use it, because these are all business opportunities, just because you can't, they're not business opportunities specifically for you. It doesn't mean that there's not a person around the corner that can really use this business.

Speaker 2 00:06:34 So we try to make sure that, you know, we we're, we're spreading it around and make sure that everyone's taken care of and a big, big part of that is updating your lead statuses. And that's one of the that's, that's, that's a tough, that's a tough one to climb because, um, a lot of our reps, you know, this may be one of three CRMs that they have to go into and it's like, Oh, I can't, you know, I'm busy, I can't do this. And I, we understand that. So we're just working to make it a little bit easier for you. Um, but we, it, we're constantly getting feedback from our dealers saying, Hey, no, it'd be great if we did this, Oh, can you add this in there? Because I find myself doing this a lot and it's time consuming,

Speaker 1 00:07:08 Be sure to tune in for upcoming episodes to help you understand the fenestration industry, what you need to know when buying windows and doors and other related topics, --

-- you can find out more about us@pgtuniversity.com. You can also find us on Facebook and LinkedIn,

Speaker 2 00:07:27 Good feedback. And you know, what I do is I take that, uh, I run it over to my development team, and then we incorporate that into our next sprint. So as we're developing it, we're constantly adding in community feedback to build it to specifically for our dealers. Like one of our biggest features is the ability to assign leads to your sales reps. And that's something we didn't even think about. We had a dealer that was saying, Hey, I'm getting too many leads. I don't know what to do with them. So we built this system. Yeah.

Speaker 1 00:07:49 What a great problem. Oh, really? That's fantastic too much. I'm getting too many referrals. I'm getting too many customers from you.

Speaker 2 00:07:58 So we did that and it actually turned into one of our best features because people use it all the time. We help it to manage, uh, use it to help manage our distributors. And, um, we kind of, you know, forced that framework around it. But, um, it's been pretty helpful. Like I said, it's at no cost to your business. It's been really neat for businesses that are super small and they don't have a CRM. They don't have any of these things. So to be able to have that Lee or to have this system where you can go in and manage these leads and do all that, um, it's, it's been pretty awesome. Um, through the form fills, uh, we also qualify calls to our dealers as a lead because that's somebody looking for windows and make an action to contact you and say, Hey, I need these things.

Speaker 2 00:08:36 Um, so if I go on to a PGT website, I look for a dealer in my area and I see their phone number and I click on it. I G you know, I start calling them the number that they see on the website. It's actually different than the dealer's actual phone number. We use a call forwarding service. And so what that ends up doing is that we record the call for quality assurance and training purposes. When the end consumer is, Hey, I, you know, mixed this call, um, what they hear is, you know, um, you know, this call may be recorded for quality assurance and training purposes, which is pretty standard, right? Um, when the dealer picks up the phone, they hear a transferring a lead on behalf of, you know, PGT, CGI WinDoor receipt, fill in the blank. And so when they, so when they answered the phone, they know exactly where that leads coming from, who, you know, who's sending it that way.

Speaker 2 00:09:15 They know how to answer the phone at that point, what brand it's for what's neat is that we get, we get those recording recordings of the call, but so do the business managers. So if you have, so if you have a lead match account, you can look at your leads from the form fills. He can also view your calls. So you can look at, you know, you can listen to the recordings and it pre-fills a lot of the data. And so if you've got a call that you could turn into a lead, you, we have a lot of it prefilled for you just go in there, fill in some blanks, click confirm, and now you have that lead in your dashboard that you can service in your

Speaker 1 00:09:42 How fabulous. Um, but before we go, and this is a question that we're asking all of our guests, because this is the clear impact podcast, who is a person, what is an event that has had a major impact in your life?

Speaker 2 00:09:54 So, aside from my marriage, because I'm sure my wife will be listening to this. Um, one of the major things that changed my life, both surround in the military. So deciding to join the military was a pretty big change for me. I went from, I was a criminology major at Florida state, and I realized that I needed to do something a little bit different. So I joined the military and I went from that life to the life of an aircraft mechanic within a year of signing up, I was on a flight deck, you know, and off the coast of Eden doing God knows what. So that was a pretty big change for me. Did it really impacted my work ethic and, um, my, my self efficacy, you know, just knowing that if I need to do something, I know I can do it cause chances are I've done it before.

Speaker 2 00:10:30 Um, so that, that was a major one for me. And then on that outs, you know, on the other side of that, leaving the military, because when you're in the military, it's they treat you really well and they make it. So you don't really hav --

-- e to ask for anything you don't want for anything else. I mean, you work for it. You know, you know, I was working some pretty, pretty crazy hours, but deciding that I needed to do something different, um, out of the military and out of aviation, that was a major shift for me as well, because I had a certain lifestyle I was accustomed to, and I was making really good money in the military and living that life. But I was working on average 80 to 90 hour work weeks. I was gone all the time. I was a major impact on my family and stuff like that. So I knew I needed to change. And my, my dad was in aviation maintenance his entire life. So I know that as long as I'm in aviation maintenance at my work-life balance is going to be skewed heavily. So I knew I needed to make a change. And so getting out and trailblazing and figuring out what I want to do, that was all, you know, when I think back when I fall, like the breadcrumbs back, it started with what the decision I made just to get out of the military. So those are the major things

Speaker 1 00:11:26 For sure. Nice. So what is the best form of exercise?

Speaker 2 00:11:30 Whatever you can see yourself doing at the end of a long day. And that's what I tell everybody, my wife loves it. She loves doing Zumba. Okay. So I would say sign up for Zumba, do it because for me, um, exercise should be seen as a release. It should be something that you look forward to. And if it's one more thing to do at the end of a long day, they're like, Oh, I don't want to do that. Then you're not going to do it right. You're not going to do it. Not everyone likes going into a weight room and picking things up and putting it back down. You know, that's not a lifestyle for everybody, but you'd be surprised. There's so many different ways to exercise and incorporate it into your life. And, and, you know, have it feed your soul as much as you're feeding your body. If you, if you're not, if you're not filling both those cups, then whatever you're doing has a timeline on it and it's not going to be sustainable.

Speaker 1 00:12:07 I couldn't agree more. Awesome. Well, Josh, I'm so glad that we had a chance to do this today. Thanks for joining us. I'm sure we'll have you back. I know we want to do an entire series around marketing and, um, things that we can help our dealers know more about. Um, again, this is all under the education umbrella of P GTI. And so we want to bring as many tools as possible into the hands of our dealers so that they can be successful. Uh, so I really appreciate your time today. Thanks for having me. Thanks so much. It was a lot of fun. PGT university is the customer education team for an entire family of brands. We began with the original, easy breeze port and closure line then became PGT. America's leading brand of impact resistant windows and doors. We then added CGI, CGI WinDoor, Western windows, new South windows and echo windows and doors. We create products built to withstand major storms, keeping people safe, secure, and prepared. Our exceptional brands give you the protection you need without compromising design or functionality. PGT university is here to educate you our listener so that you can be a more informed consumer of window and door prizes.

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