

Door Dealer Accreditation

Section 6

Sales and Marketing



Acknowledgements

Many dedicated individuals have played a role in the development of this study guide and the Door Dealer Accreditation program. Many organizations have generously contributed the talents of their human resources, which have been essential to the completion of this important professional credential. We deeply appreciate everyone who played a role.

The Institute of Door Dealer Education and Accreditation wishes to especially recognize the organizations and industry professionals who have made the completion of this project a priority in their industry objectives and professional careers:

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Introduction

Sales and marketing are closely connected functions within any door dealer business. Sales focuses on converting opportunities into revenue by guiding customers through the decision making process and closing transactions. Marketing identifies, attracts, and nurtures potential customers by creating awareness, generating demand, and positioning the company's products and services in the marketplace. These functions depend on each other and must remain in balance for the business to grow.

Marketing is the first priority because it defines who your customers are, what they need, and why they should choose your company. Developing a clear and compelling unique selling position requires thoughtful planning, consistent messaging, and smart allocation of resources. Once you understand your market potential, i.e., who you serve, what they value, and how you stand out, then advertising and promotional efforts become far more effective.

Selling is a learned discipline. Professional salespeople rely on training, practice, and a structured process to guide customers toward informed decisions. While anyone can compete on price alone, true sales professionals create value by understanding customer needs, presenting solutions clearly, and demonstrating why the company's products and services justify their price. When these skills are developed and applied consistently, sales performance becomes a major driver of growth, profitability, and long term customer relationships.

Section One

Developing a Marketing Plan

A marketing plan is a comprehensive document that outlines how the company will attract customers, generate demand, and support the sales process. It includes both **strategic** and **tactical** components. Strategic planning focuses on long-range direction such as defining the market, identifying opportunities, and determining where the company wants to go. Tactical planning focuses on the short-term actions and tools needed to get there, such as advertising, promotions, and day-to-day marketing activities. Together, these elements provide a roadmap that aligns the company's goals, resources, and customer needs.

Organizing the Planning Process

There are several ways to organize the development of a marketing plan. In a small business, the owner may choose to create the plan independently and present it to employees. This approach ensures the plan reflects the owner's vision and priorities, and it can work well when the company has few or no employees. However, when multiple people are responsible for implementing the plan, this method can limit buy-in. Employees who do not understand how or why decisions were made may be less committed to executing the plan effectively.

Involving key employees in the planning process offers significant advantages. When employees participate in shaping the plan, they are more likely to support it and take ownership of the results. Including those who will be directly affected by marketing decisions, such as sales staff, service managers, or customer facing employees, ensures the plan reflects real world insights and practical considerations.

Collaboration also helps identify potential obstacles early and builds a shared understanding of the company's goals and priorities.

SWOT Analysis

A SWOT analysis examines the Strengths, Weaknesses, Opportunities, and Threats that influence your business. It helps you evaluate both internal factors that you control and external factors that you must respond to. By understanding these elements, you can make informed decisions about where to focus resources, how to improve performance, and how to position your company in the marketplace.

Internally, a SWOT analysis requires an honest assessment of what your company does well and where vulnerabilities exist. Externally, it involves identifying opportunities to increase sales, expand into new markets, or differentiate your business, while also recognizing the threats that could hinder growth. When considering expansion into unfamiliar markets, caution is essential; a thorough evaluation of the risks, costs, and operational requirements should always precede any major move.

The most effective way to use a SWOT analysis is through **matching** or **converting** strategies. A *matching* strategy pairs your strengths with market opportunities to create a competitive advantage. A *converting* strategy focuses on transforming weaknesses or threats into strengths or opportunities through training, investment, or operational changes.

Following are the key components of a SWOT Analysis:

- (1) **Strengths** – Identify what your company does exceptionally well. Where do you outperform competitors? Do you have a clear *Unique Selling Proposition (USP)* that sets you apart? Consider how you can define, enhance, and leverage these strengths to gain market share and reinforce your position in the marketplace.
- (2) **Weaknesses** – Determine the areas where your company is vulnerable or underdeveloped. Weaknesses may relate to staffing, financial resources, experience, technical knowledge, or physical assets. Many weaknesses can be reduced or eliminated through training, process improvements, or strategic investment.
- (3) **Opportunities** – Look for markets, sub-markets, or customer segments that offer potential for growth. Identify “low-hanging fruit”, or areas where demand exists but competitors are not fully meeting customer needs. Consider whether changes in the local economy, technology, or customer behavior create openings for you to sell more products or services.
- (4) **Threats** – Recognize the external forces that could negatively impact your business. Competitive pressures, economic shifts, regulatory changes, technological advancements, and societal trends can all pose risks. While you cannot control these factors, staying aware of them allows you to prepare, adapt, and minimize their impact.

Conducting a SWOT analysis requires gathering information from multiple sources so the assessment reflects the real conditions of your business. Begin by reviewing internal data such as sales reports, customer feedback,

service records, financial statements, and employee input. These sources help you identify patterns. Things like what customers appreciate, where delays or errors occur, which products are most profitable, and where the company struggles.

External information is equally important. Study your competitors, local economic conditions, building trends, new technologies, and changes in customer expectations. The goal is to build a clear picture of your current position in the marketplace.

Once the information is collected, organize it into the four SWOT categories and look for relationships between them. Strengths and weaknesses describe your current capabilities, while opportunities and threats describe the environment in which you operate. The value of the analysis comes from understanding how these factors interact.

For example, a strong installation team (strength) may allow you to pursue commercial work (opportunity), while a shortage of trained technicians (weakness) may limit your ability to expand into new service areas. Identifying these connections helps you prioritize where to focus your efforts.

The next step is to translate the SWOT findings into actionable strategies. Matching strategies pair your strengths with opportunities. For instance, using your reputation for fast service to target homeowners frustrated with slow competitors.

Converting strategies focus on turning weaknesses or threats into strengths or opportunities. If you lack a strong online presence (weakness), investing in a modern website and digital advertising can convert that weakness into a competitive advantage. If a new competitor enters your market (threat), strengthening customer loyalty programs or improving response times can help protect your market share.

Finally, use the insights from the SWOT analysis to develop specific tactics that support your broader strategies. Tactics are the concrete actions you will take, such as launching a seasonal promotion, training sales staff on a new product line, improving your showroom layout, or partnering with local builders. Each tactic should directly address an item identified in the SWOT analysis and should be measurable so you can evaluate its effectiveness.

When done correctly, the SWOT analysis becomes more than an academic exercise; it becomes a practical tool that guides decision making, resource allocation, and long term growth.

Marketplace Analysis

A marketplace analysis helps you understand the environment in which your company operates. It identifies who your customers are, how large the market is, who your competitors are, and where opportunities or risks may exist.

If your budget allows, having an outside consultant conduct this analysis can be valuable because an independent evaluator brings no preconceived notions about your company, your reputation, or your competitors.

Whether performed internally or externally, the analysis should reflect current market conditions and provide a realistic picture of your position in the industry.

A thorough marketplace analysis should examine several key areas:

Market Share - Determine your share of the market for each product and service you sell and install. Break this down by product category, such as residential garage doors, commercial doors, gate operators, dock equipment, and entry doors, as well as by customer type, including homeowners,

builders, developers, general contractors, and facility managers. Understanding your share in each segment helps you identify where you are strong, where you are vulnerable, and where growth potential exists.

Customer Analysis - Identify your primary and secondary target customers. The 80/20 rule applies strongly in the door industry: roughly twenty percent of your customers will generate eighty percent of your revenue. Use customer profiles and demographic information to define your ideal customer. This allows you to focus your marketing and sales efforts on the customers most likely to buy from you, rather than spreading resources too thinly across less profitable segments.

Competition Analysis - Understand who your competitors are and how they compete. This should be done for every market segment you serve. Conducting a separate SWOT analysis on each major competitor can reveal their strengths, weaknesses, and vulnerabilities.

Knowing whether a competitor relies on professional sales tactics, competes primarily on price, or differentiates through service quality helps you determine how to position your company. This insight allows you to build strategies that highlight your advantages and minimize the impact of their strengths.

Regardless of how your competitors operate, a value added selling strategy is essential. Competing on price alone is rarely sustainable in the door industry. Instead, your sales presentations should clearly communicate the value your company delivers - quality products, professional installation, safety expertise, responsive service, and long-term reliability. When customers understand the value you bring, price becomes only one part of the decision rather than the deciding factor.

A well-executed marketplace analysis gives you the information needed to set realistic goals, choose effective strategies, and allocate

resources wisely. It also helps you anticipate changes in customer behavior, competitive pressure, and economic conditions. With this foundation in place, your marketing plan becomes a practical tool for guiding growth rather than a theoretical exercise.

Set Marketing Goals and Define Objectives

Without clear goals and objectives, both you and your employees operate without direction. Goals provide focus, establish priorities, and act as rallying points for the business. They tell everyone what the company is trying to achieve and how success will be measured.

Lewis Carroll captured this idea perfectly in *Alice's Adventures in Wonderland*, when Alice asks the Cheshire Cat which way she ought to go. The Cat replies that it depends on where she wants to get to - because without a destination, any path will do. The same is true in business: without defined goals, you may stay busy, but you will not move forward with purpose.

Effective goals and objectives share several characteristics:

- *Clear* – They specify exactly what is to be accomplished.
- *Quantified* – They include measurable results so progress can be tracked.
- *Focused* – They concentrate on what truly matters and avoid drifting into nonessential or uncontrollable areas.
- *Realistic* – They are ambitious but achievable with available resources.
- *Agreed* – Those responsible for achieving the goals should participate in setting them and commit to their attainability.

Setting goals is only the first step. To be useful, goals must be translated into specific, actionable objectives that guide daily decisions

and resource allocation. A goal such as “increase residential sales” becomes meaningful only when broken down into measurable components. For example, increasing residential door sales by 12% over the next 12 months, or generating 30 additional qualified leads per month through targeted advertising.

Objectives should answer three questions:

1. What exactly are we trying to achieve?
2. How will we measure success?
3. What actions will move us toward the goal?

This process ensures that goals are not vague aspirations but practical tools that shape behavior and decision-making.

Marketing goals should be grounded in the information gathered during your SWOT and marketplace analyses. Strengths and opportunities often point directly to growth goals, while weaknesses and threats may highlight objectives related to training, process improvements, or competitive positioning.

For example:

- If your SWOT reveals strong service capabilities, a goal might be to expand service contracts by 15%.
- If your marketplace analysis shows a growing builder segment, an objective might be to secure three new builder accounts within six months.
- If competitor analysis shows aggressive price cutting, a goal might be to strengthen your value added messaging and increase close rates without discounting.

When goals are tied to real data, they become more realistic, more strategic, and more motivating.

Key Performance Indicators

Key Performance Indicators (KPIs) act as mileage markers and early warning signals that show whether your marketing and sales efforts are moving the company toward its goals. KPIs are measurable statistics tracked on a regular basis - daily, weekly, monthly, or quarterly - that reveal both where you are on track and where corrective action may be needed. When chosen well, KPIs give you a clear, objective picture of performance and help you make timely decisions before small issues become major problems.

Examples of KPI's are:

- Sales targets
- Return service trips
- Customer complaints
- Margin
- Labor costs

Not every metric is a KPI. A KPI must directly support one of your marketing goals or business objectives. For example, if your goal is to increase residential sales, KPIs might include the number of qualified leads generated, close rates, or average ticket size. If your goal is to improve customer satisfaction, KPIs might include callback rates, online reviews, or response times.

Good KPIs share several traits:

- They are measurable and based on objective data.
- They are relevant to the goals you are trying to achieve.
- They are actionable, meaning the team can influence them through behavior or process changes.
- They are timely, allowing you to track progress frequently enough to make adjustments.

To use KPIs effectively, you must establish a consistent method for collecting and reviewing data. This may involve using your CRM, accounting software, scheduling system, or simple spreadsheets. The key is consistency. KPIs lose value if they are measured irregularly or with changing definitions.

Most companies benefit from reviewing KPIs at set intervals:

- Daily: lead counts, incoming calls, website inquiries
- Weekly: close rates, marketing campaign performance, service callbacks
- Monthly: revenue, margin, labor costs, customer satisfaction
- Quarterly: market share, customer retention, advertising ROI

Regular review meetings help ensure that KPIs remain visible and meaningful to the team.

KPIs are only useful if they lead to decisions. When a KPI shows positive progress, it reinforces that your strategy is working. When a KPI falls short, it signals the need to investigate and adjust.

For example:

- Rising return service trips may indicate training gaps or quality control issues.
- Declining close rates may point to pricing concerns, weak sales presentations, or poor lead quality.
- Increasing labor costs may require scheduling adjustments or improved job planning.
- Strong margins may confirm that your value added selling strategy is effective.

By connecting KPI trends to specific actions, you create a continuous improvement cycle that strengthens both marketing and sales performance.

KPIs also help align employees around shared goals. When team members understand what is being measured and why, they can see how their daily work contributes to the company's success. Posting KPIs, reviewing them in meetings, and celebrating improvements builds accountability and reinforces a performance driven culture.

Define Metrics

Metrics are the quantitative measures used to evaluate the company's progress toward its marketing goals and objectives. KPIs identify the most important measures to track, while metrics are the specific numerical values used to evaluate progress toward those KPIs.

For a metric to be useful, it must measure movement toward a goal in a clear, numerical way. Metrics can relate to sales, profits, costs, expenses, lead generation, or customer behavior. A metric should never be stated vaguely. For example, *increase sales* is not a metric. A valid metric specifies the expected improvement, such as *increasing commercial door sales by 15%*.

Metrics must be consistent, measurable, and directly tied to the goals they support. When tracked regularly, they show whether the company is improving, holding steady, or falling behind. They also help identify when adjustments are needed in marketing, sales, staffing, or operations. By defining metrics clearly and reviewing them routinely, the company can stay aligned with its objectives and make informed decisions based on actual performance rather than assumptions.

Determine and Select Strategies and Tactics

This is the point in the planning process where your vision for the company becomes

actionable. Once your goals and objectives are established, you must decide how you plan to achieve them. This section of the marketing plan outlines the strategies you will use and the specific tactics that support those strategies. It should clearly describe how, when, and where you will promote and advertise your company, and it should include the budget you will allocate for these activities. A well-defined set of strategies and tactics ensures that your marketing efforts are coordinated, purposeful, and aligned with the results you want to achieve.

For example, if your goal is to increase residential sales by 12%, your strategy might be to strengthen your presence with homeowners in your service area. Supporting tactics could include running targeted digital ads within a 15 mile radius, updating your website's residential product pages, and offering a seasonal promotion to encourage early spring replacements.

Present Plan to Employees

Your employees have a vested interest in the success of your company, and their support is essential for any marketing plan to work. Including key employees in the planning process increases understanding, ownership, and commitment. It also helps ensure that the people responsible for carrying out the plan believe in its direction and feasibility. Recognition or small celebratory events tied to achieving a KPI or metric can further reinforce buy-in and keep employees motivated.

Once goals and objectives are set, they must be communicated clearly to everyone involved. Employees need to understand not only what the goals are, but why they matter and how their work contributes to achieving them. Goals should be reviewed regularly, monthly or quarterly, to evaluate progress, adjust tactics, and ensure the company remains on course.

Implement Plans

Implementation is the stage where the marketing plan becomes real, and it requires steady support from all employees. A dealer does not need to launch every initiative at once. It is far more effective to introduce one program or activity at a time, allow employees to understand it, and give the company time to adjust. Rolling out too many changes simultaneously can create confusion, overwhelm staff, and dilute the focus needed for each initiative to succeed.

Start with the elements of the plan that are easiest to execute or most likely to produce early wins. Early success builds confidence and reinforces employee buy-in. As each phase begins to show the expected results, move on to the next component of the plan. This phased approach keeps the organization aligned, reduces resistance to change, and ensures that resources for time, budget, and personnel are used efficiently.

Clear communication is essential during implementation. Employees should know what is being introduced, why it matters, and what their role is in carrying it out. Providing simple checklists, timelines, or brief training sessions can help ensure that everyone understands the expectations. Consistent follow-through from management reinforces that the plan is not optional and that each step contributes to the company's larger goals.

Successful implementation is not a one-time event; it is a disciplined process of introducing, supporting, and reinforcing the actions that move the company toward its objectives. When approached methodically, implementation becomes the bridge between planning and measurable results.

Monitor, Control, and Adjust Plans

A marketing plan only works if it is actively monitored and managed. Once implementation begins, the plan should be reviewed regularly to ensure each part is carried out as intended and progress is being made toward the goals. The plan should remain a working document. It should not be filed away after the initial rollout. Consistent follow-up reinforces that the plan matters and that the company is committed to achieving the results it outlines.

Regular communication with employees is essential. Ask team members where they stand with their assigned responsibilities, what challenges they are encountering, and what support they may need. This ongoing dialogue keeps everyone aligned and helps identify issues early, before they affect performance.

Tracking results against sales trends, customer activity, and market share provides an objective view of how well the plan is working. Posting key results keeps performance visible and encourages accountability across the organization.

Celebrating progress is an important part of maintaining momentum. When goals, KPIs, or metrics are achieved, recognize the accomplishment and acknowledge the employees who contributed to it. Positive reinforcement strengthens buy-in and encourages continued effort.

If the plan is not producing the expected results after a reasonable testing period, it should be adjusted. This may involve refining tactics, reallocating resources, or revisiting whether certain goals were too aggressive. Market conditions, customer expectations, and competitive pressures change over time, and your marketing plan must adapt accordingly. A willingness to reassess and adjust ensures that the plan remains relevant, effective, and aligned with the company's long term direction.

Section Two

Principles of Effective Advertising

Advertising plays a central role in shaping how the public perceives your company and how consistently your phone rings. For door dealers, effective advertising is not simply about spending money, it is about communicating the right message to the right audience at the right time. Whether a dealer views advertising as a necessary expense or a strategic investment, the reality is that consistent, well-planned advertising builds brand recognition, supports sales efforts, and keeps your company visible in a competitive marketplace.

Successful advertising requires more than choosing a medium and running an ad. It begins with understanding your customers, defining what you want to accomplish, and selecting the approaches that best support your goals. This chapter outlines the core principles that guide effective advertising and provides a framework for developing, executing, and evaluating an advertising plan that fits your market, your budget, and your business objectives.

Developing an Advertising Plan

Advertising, according to *Webster's Dictionary*, is the action of calling something to the attention of the public, especially by paid announcements. Some business owners view advertising as a necessary evil, while others see it as a worthwhile investment. For a door dealer, consistent advertising is essential for building brand recognition, keeping your company visible in the community, and ensuring the phone continues to ring. Effective

advertising supports both short term sales and long term growth.

The first step in developing an advertising plan is determining who you want to reach. Understanding your target audience allows you to choose the right message, the right medium, and the right timing.

Several key considerations guide this process:

- *Customer demographics* - Identify the age range, gender, income level, and buying habits of your ideal customer. Different groups respond to different advertising channels.
- *Target-specific rotation* - Decide when to shift your advertising to focus on specific customer groups, such as homeowners, builders, or commercial facility managers.
- *Market reach* - Define the geographic area you want your advertising to cover. This may be a single community, multiple counties, or a broader regional market.
- *Seasonal timing* - Determine when your advertising dollars are most effective. Customer needs often change with the seasons, and timing your message correctly can increase response rates.

Some of these answers are straightforward, while others become clearer through experience and tracking sales by season, product type, and customer location.

For example, advertising for service work in September or October can help capture customers before cold weather increases demand and reduces scheduling flexibility.

A well-designed advertising plan ensures that your message reaches the right people at the right time, using the methods most likely to generate results. It becomes the foundation for consistent, effective communication with your market.

Establishing a Budget

Setting an advertising budget can be approached in several ways, but the most common method is to allocate a percentage of projected sales for the coming year. Many door dealers use three to five percent as a starting point, adjusting as needed based on the cost of advertising in their local market. High demand for certain media, such as local television, radio, or digital placements, may increase costs and require you to reconsider how your budget is allocated.

Today's advertising landscape offers a wide range of media options. Because a dealer's advertising funds are limited by projected sales, it is usually more effective to concentrate spending on a few well-chosen media, rather than spreading small amounts across too many channels. A focused approach allows your message to be seen repeatedly by the same audience, which is far more effective than a shotgun approach with minimal exposure in many places.

When building your budget, remember to check with manufacturers and suppliers about available cooperative advertising funds. Many will reimburse a portion of your advertising costs when their products are featured. Their representatives can provide the specific rules and requirements for qualifying ads.

A key objective of any advertising plan is to create multiple impressions with potential customers. Consumers rarely need a door dealer the first time they see or hear your message. It often takes ten to twelve

exposures before a customer recognizes your company name or logo and thinks of you when service or replacement is needed. This repeated exposure is the foundation of branding.

One way to evaluate the cost effectiveness of advertising is to ask your media representative for the cost per thousand impressions (CPM). This figure divides the cost of an advertisement by the number of people expected to see or hear it, allowing you to compare different media on equal footing.

Example:

A 30 second television spot costing \$400 and reaching 10,000 potential customers has a CPM of \$40.00. ($\$400 \div 10$).

A newspaper ad costing \$300 and reaching 6,000 potential customers has a CPM of \$50.00. ($\$300 \div 6$).

Some forms of advertising such as yellow pages, billboards, outdoor signage, trade shows, and truck graphics are more difficult to evaluate using CPM. In these cases, the most practical way to assess effectiveness is to ask customers how they heard about your company and track those responses over time.

Branding Strategy

As you develop your advertising and spending plan, part of your strategy should be to strengthen recognition of both your company's name and the brands you represent. Effective branding helps customers associate your company with quality, reliability, and the specific products you sell. Your advertising should make it clear that your company proudly installs recognized brands of doors, operators, or related products so customers connect your business with the manufacturers they already trust.

As you review the media options in the following sections, keep in mind that every advertisement serves a dual purpose: reinforcing your company's identity and highlighting the product brands you carry. Consistent use of your company name, logo, colors, and messaging, combined with the brand names of your products, helps build familiarity and increases the likelihood that customers will remember you when they need service or replacement.

Company Image

A strong company image begins with a symbol or logo that customers can quickly recognize and associate with your business. The most effective logos in the world, such as the golden arches of McDonald's, or the Apple silhouette, or Facebook's white "f" in a blue square, are simple, memorable, and instantly tied to the companies they represent. Your goal is to create the same kind of recognition within your market, even if on a smaller scale.

Logo development can be done in-house, through a professional graphic designer, or by using modern online design platforms. Regardless of the method, the process typically involves reviewing multiple sample designs and selecting the one that best represents your company's personality, values, and professionalism. Many dealers find it helpful to gather feedback from employees, family members, or a small group of customers to determine which design is most appealing and memorable. Simplicity is essential as customers often see your logo only for a moment, so it must be clean, clear, and easy to identify at a glance.

Today's design options also include online services where multiple artists submit logo concepts based on your description. These platforms can generate dozens or even hundreds of sample logos at a relatively low

cost. For example, you can submit a design request and have artists worldwide compete by submitting their concepts, with the winning designer receiving a modest award. This approach provides a wide range of creative ideas and can be an affordable way to explore many possibilities before selecting the final design.

In some cases, a company may choose to undergo a full rebranding. Rebranding involves more than updating a logo. It is a comprehensive effort to create a new visual identity and message for the company. Professional branding firms can help develop a cohesive look that extends across truck wraps, uniforms, signage, website design, printed materials, and digital media. Rebranding is a larger investment, but it can significantly strengthen market presence, modernize the company's image, and create a unified look that stands out from competitors.

Once your logo and brand identity are established, they should be used consistently across all company materials. This includes everything from small items such as customer gifts and business cards to major advertising formats like billboards, television spots, and print ads. Consistent use reinforces recognition and strengthens your brand identity.

Your logo should also appear on all company signage and materials, including truck and service vehicle decals, technician and office staff uniforms, stationery, proposals, invoices, brochures, social media profiles, print advertising, trade show displays, direct mail pieces, outdoor advertising, showroom signage, etc. The more consistently your brand is presented, the more familiar and trusted your company becomes in the eyes of potential customers.

Yellow Pages

The traditional telephone yellow pages were once a primary source of information for consumers, but their relevance has declined sharply as customers increasingly rely on computers, smartphones, and tablets to find local businesses. Many households no longer receive or keep a physical directory, and usage continues to drop each year. Still, a small segment of less tech-savvy consumers may refer to the yellow pages for contact information or when trying to recall a company name, so maintaining a minimal listing can still have limited value in certain markets.

For dealers who continue to advertise in the yellow pages, the most common headings remain *Doors*, *Garage Doors*, *Doors-Repairing*, and *Doors and Gate Operating Devices*. Some consumers also use the directory to confirm that a company has a local phone number rather than a toll-free number, which can reinforce the perception of a local, community-based business.

When designing a yellow pages advertisement, keep the layout simple and uncluttered. Highlight key features such as IDEA credentials, 24 hour service availability, affiliations with nationally recognized manufacturers (which may qualify for coop advertising funds), and complete contact information including your website, address, and phone number. Even a small ad should reinforce your brand and direct customers to your digital presence.

Electronic Marketing

The internet has fundamentally changed how society functions, how people gather information, and how businesses reach their customers. Even traditional advertising media have evolved to meet the expectations of an online population.

For many small businesses, the first step into this new environment was launching a basic website, but today, a static website alone is as outdated as a sandwich board. Modern consumers expect a dynamic, informative, and mobile-friendly online presence.

Electronic marketing, often called eMarketing, uses marketing principles and techniques delivered through electronic media, especially the internet. It includes both direct and indirect marketing elements and uses a wide range of technologies to connect businesses with customers. By definition, eMarketing encompasses all activities conducted online with the goal of attracting new business, retaining current customers, and strengthening brand identity.

Today's most important components of electronic marketing include:

Google Business Profile - The modern equivalent of a phone book listing. It displays your hours, reviews, photos, service area, and contact information, and is often the first result customers see when searching for garage door services.

Online Directories - Platforms such as Yelp, Angi, HomeAdvisor, and local chamber-of-commerce directories help customers compare local service providers. Listings in industry-specific directories, such as the IDEA Accredited Dealer search or manufacturer "Find a Dealer" tools, can also generate qualified leads from customers who are actively seeking reputable companies.

Search Engine Marketing - Paid search ads on Google or Bing that appear when customers search for terms like "garage door repair near me."

Mapping Platforms - Google Maps and Apple Maps listings are now major discovery tools for local services.

Social Media Business Pages - Facebook, Instagram, and Nextdoor allow businesses to share updates, promotions, photos, and customer reviews.

Website Optimization - A modern website should be mobile friendly, easy to navigate, and updated regularly with accurate information, photos, and calls to action.

Email Marketing - A cost effective way to stay in touch with existing customers, promote seasonal services, and encourage repeat business.

These digital tools have largely replaced the role the yellow pages once played. They offer far greater reach, better targeting, and measurable results that help dealers understand which advertising efforts are working. For most door dealers, investing in electronic marketing provides a stronger return on investment than traditional printed directories.

Website

A modern website is now as essential to a business as a phone number. For most customers, it is the first place they go to learn who you are, what you offer, and whether they trust you enough to call. A website must look professional, load quickly, and clearly communicate what your company represents. Search engines also rely heavily on the quality and relevance of your content, so the information you publish directly affects how easily customers can find you online.

A website today is far more than an online brochure. It functions as a central hub for your entire marketing strategy. When planning or redesigning your site, it helps to think about how it will support your business every day. Key questions include who your target online audience is, what information they need most,

and how your website can guide them toward contacting you or scheduling service.

Modern websites for door dealers typically serve several core functions:

- **Promotions** - Highlight seasonal offers, financing options, or manufacturer rebates.
- **Sales tool** - Provide product photos, specifications, comparisons, and educational content that helps customers make informed decisions.
- **24/7 salesperson** - Allow customers to request service, schedule appointments, or submit inquiries at any time, even outside business hours.

A strong website also differentiates your business from competitors. Clear messaging, professional photography, customer testimonials, and visible credentials such as IDEA Dealer Accreditation and Technician Certifications help establish credibility. Showcasing your team, your trucks, your showroom, and your installation work builds trust and reinforces that you are a local, reputable company, not just another name in a search result.

Several additional elements are now considered essential for an effective website:

Mobile Friendly Design - Most customers will view your site on a phone. Pages must load quickly and display cleanly.

Search Engine Optimization (SEO) - Using accurate service descriptions, local keywords, and structured content helps your site appear in search results.

Clear Calls to Action - Prominent “Request Service,” “Schedule Now,” or “Get an Estimate” buttons help convert visitors into leads.

Updated Content - Outdated photos, old promotions, or broken links can undermine

credibility. Regular updates keep the site fresh and relevant.

Integration with Reviews - Displaying Google, Yelp, or manufacturer reviews builds trust and supports your online reputation.

A website is no longer optional or static. It is a living part of your marketing plan, one that must evolve as your business grows, customer expectations change, and new technologies emerge.

Local Search Optimization (Google Business Profile)

Local search optimization has become one of the most important forms of advertising for door dealers because most homeowners begin their search for service providers online. A well-maintained Google Business Profile (GBP) ensures your company appears prominently when customers search for garage door repair, installation, or replacement in your area.

Keeping your profile updated with accurate hours, service areas, photos of recent installations, and a clear description of your services increases visibility and encourages customers to call directly from the listing.

Regularly posting updates, promotions, or seasonal reminders also signals activity and professionalism, which can improve ranking in local search results. Because GBP is free, it offers one of the highest returns on investment of any advertising activity.

Pay per Click (PPC) Advertising

Pay-Per-Click advertising is an online model in which advertisers pay only when a user clicks on their ad. These ads typically appear on Search Engine Results Pages (SERPs), often above the organic listings or in designated ad

spaces. Because payment is tied directly to user action, PPC is considered a performance based advertising method and can be one of the most measurable and controllable forms of digital marketing available to door dealers.

PPC has become a core component of modern electronic marketing because it allows businesses to reach customers at the exact moment they are searching for garage door service, repair, or replacement. When managed properly, PPC can generate high quality leads, support seasonal promotions, and help new or rebranded companies gain visibility quickly.

Key Characteristics of PPC:

Bidding Determines Placement - Ad position is influenced by a bidding system. Higher bids generally receive higher placement, but search engines also factor in ad quality, relevance, and expected click-through rate. A well-written, highly relevant ad can outrank a higher bidder if its quality score is stronger.

PPC Requires Ongoing Management - A PPC campaign is not a “set it and forget it” tool. It must be monitored regularly to adjust bids, refine keywords, test new ad copy, and ensure the campaign is producing a strong return on investment. Costs can rise quickly if a campaign is left unmanaged.

Keyword Strategy is Essential - Selecting the right keywords determines who sees your ads. Highly targeted keywords such as “garage door spring repair,” “garage door dealer near me,” “commercial overhead door service”, or “attract customers who are ready to buy. Broad or poorly chosen keywords can waste budget on irrelevant clicks.

Local Targeting Improves Efficiency - PPC platforms allow you to target specific cities, ZIP codes, or service areas. This ensures your ads are shown only to customers within your actual

market, reducing wasted spending and increasing conversion rates.

Landing Pages Matter - The page customers land on after clicking your ad should be clear, relevant, and designed to convert. A strong landing page includes a simple explanation of the service, trust building elements such as credentials, reviews, and photos, as well as a prominent call to action such as “Schedule Service” or “Request Estimate.”

Seasonal Adjustments Increase

Effectiveness - Door dealers often see seasonal spikes in service calls. Adjusting bids or running targeted promotions during peak seasons, such as fall service campaigns or spring opener specials, can significantly improve results.

Why PPC Works Well for Door Dealers: PPC is especially effective for door dealers because customers often search online at the exact moment they need urgent service, such as a broken spring or a door that has been hit by a vehicle. PPC allows your company to appear immediately in those search results, even if your website is new or still building organic ranking. Dealers also benefit from the high level of control PPC provides: you can set daily budgets, pause campaigns instantly, and track precisely which ads generate leads. In addition to driving immediate traffic, PPC supports long term branding by keeping your company name visible at the top of search results, reinforcing recognition each time a customer searches for garage door services.

Practical Tips for Dealers: A few practical guidelines can help dealers manage PPC campaigns more effectively and improve overall results.

- Begin with a modest budget and increase spending as you identify which keywords generate the strongest results.
- Use negative keywords to block irrelevant searches. Terms like “garage door stickers”

or “DIY repair” prevent your ads from appearing for users who are not seeking service.

- Track phone calls, form submissions, and other conversions so you can determine which ads are producing real leads and which need adjustment.
- Test multiple versions of your ad copy to learn which messages resonate most effectively with your audience.
- Refine your campaign over time to improve performance, reduce wasted spending, and increase your overall return on investment.

PPC can be one of the most cost effective tools in a dealer’s advertising plan when managed carefully. It provides immediate visibility, measurable results, and the ability to reach customers at the exact moment they need your services.

Social Media

Social media has become a major component of modern marketing because it allows businesses to create and share content that attracts attention, encourages engagement, and spreads naturally through users’ personal networks. Effective social media marketing focuses on producing posts, photos, videos, and updates that customers find interesting enough to comment on, react to, or share with others. When this happens, the message travels from user to user in a way that feels organic and trustworthy.

This type of sharing is often referred to as electronic word-of-mouth (eWoM). This is any statement consumers share online about a product, service, brand, or company through social networks, messaging apps, community groups, or news feeds. Because these messages come from real people rather than the business itself, they carry the credibility of a third-party endorsement.

When a customer shares a positive experience, recommends your company, or reposts your content, it becomes earned media, not paid advertising. Earned media is especially valuable because it expands your reach, strengthens your reputation, and influences potential customers who trust recommendations from friends and neighbors far more than traditional ads.

Social media platforms also allow door dealers to showcase recent installations, highlight promotions, share educational tips, and respond directly to customer questions. Over time, consistent posting and engagement help build familiarity with your brand and keep your company top-of-mind when customers need service or replacement.

Many companies choose to manage their social media presence internally. Most platforms such as Facebook, Instagram, and Nextdoor offer built-in tools that allow businesses to target specific audiences by geography, age, interests, and homeowner status. These tools make it possible to direct posts and ads toward the customers most likely to need garage door service or replacement. In-house management also allows for quick posting of real time content, such as same-day installations, community involvement, employee spotlights, and seasonal promotions. With consistent posting and basic familiarity with platform settings, a dealer can build meaningful engagement without significant cost.

Other companies prefer to hire an outside firm to handle their social media strategy. These firms can create professional quality posts, manage posting schedules, respond to comments, and run targeted ad campaigns designed to increase engagement and generate leads. Outsourced management is especially helpful for businesses that lack the time, staff, or expertise to maintain a steady online presence. A marketing firm can also

ensure that branding, messaging, and visual style remain consistent across all platforms, and they can provide analytics that show which types of content are performing best.

Together, these approaches allow a dealer to choose the level of involvement that fits their resources and goals, whether that means managing social media personally, delegating it to a trained staff member, or relying on a professional agency to maintain a polished and consistent online presence.

Nextdoor Neighborhood Advertising has become a powerful platform for hyper-local advertising because it reaches homeowners within specific neighborhoods. Sponsored posts, local deals, and neighborhood announcements allow door dealers to promote services directly to the communities they serve.

Many homeowners use Nextdoor to ask for recommendations, and maintaining a visible, professional presence increases the likelihood that your company will be mentioned in these conversations. Because Nextdoor users are typically homeowners, the platform naturally aligns with the target audience for garage door services.

Web Banner Advertising

Web banner advertising places your promotional message on another company's website, allowing visitors who see the banner to click through directly to your own site. These banners can appear in a variety of formats, such as static images, animated graphics, or interactive displays, and are typically positioned in high visibility areas of a webpage to attract attention. When a user clicks the banner, they are taken to a landing page you control, where you can present an offer, highlight a service, or encourage them to schedule an appointment.

Online banner advertising is commonly purchased on a Cost Per Acquisition (CPA) or Cost Per Click (CPC) basis, meaning you pay only when a user takes a specific action, such as clicking the ad or completing a form. Banner ads are frequently placed on industry relevant websites, local news outlets, community pages, email newsletters, and other electronic publications where your target audience is likely to spend time.

Unlike some other forms of electronic marketing that focus strictly on measurable lead generation, banner advertising also plays an important role in brand awareness. Even when users do not click the ad, repeated exposure to your company name, logo, and message helps build familiarity, similar to traditional advertising methods like billboards or print ads. The advantage of banner advertising is that it combines this brand building effect with the immediacy and trackability of digital marketing, allowing you to reinforce your presence while still capturing measurable engagement.

A natural next step is deciding where banner ads fit within your broader digital strategy, whether you want them to support branding, drive seasonal promotions, or complement PPC and social media campaigns.

Email Advertising

Email advertising remains one of the most direct and cost effective forms of electronic marketing because it allows businesses to communicate with customers in a controlled, targeted, and measurable way. Email campaigns can be sent directly from your company to your existing customer base, or they can be distributed through third-party email marketing services that specialize in reaching new audiences.

When used thoughtfully, email advertising helps maintain customer relationships, promote seasonal services, and encourage repeat business while avoiding the waste and broad targeting associated with traditional mass mailings.

A successful email advertising strategy benefits from a few key practices:

- Build your email list from your existing customer database to strengthen repeat business and stay connected with past clients.
- Use third-party email services when you want to reach new audiences beyond your current customer base.
- Allow customers to opt in or out of email communications to maintain trust and comply with email marketing regulations.
- Avoid sending spam or overly frequent messages, which can lead to unsubscribes and damage your brand reputation.
- Use email sparingly and strategically so your messages remain relevant, welcomed, and effective.

Online Public Free Listings

Free online listings are an often overlooked but highly valuable part of an eMarketing strategy. These platforms give your company additional visibility at no cost, help reinforce your legitimacy, and improve your overall online footprint. Many customers rely on these directories when comparing local service providers, and search engines use them as signals of credibility and consistency. Taking advantage of these opportunities ensures your business appears in more places where customers are already looking.

Common sources of free online exposure include:

Manufacturers' Dealer Locator Pages -

Many major garage door and operator manufacturers offer "Find a Dealer" tools that list authorized or affiliated companies. These listings often generate high-quality leads because customers using them are already motivated to buy.

Local Community Listings - Chambers of commerce, municipal websites, neighborhood associations, and local business directories frequently provide free or low-cost listings for area service providers.

IDEA Accredited Dealer and Certified Technician Locator - Accreditation and technician Certification not only strengthens your credibility, but also places your company in respected industry directories used by consumers seeking qualified and reputable professionals.

Blogs, Social Media, and Customer Reviews

- Mentions, tags, and reviews from satisfied customers act as free endorsements and help expand your digital presence.

Website Links - Backlinks from partner businesses, local organizations, or community pages improve your visibility and support search engine optimization.

Maintaining consistency across all of your free online listings is essential because search engines use this information to verify that your business is legitimate and trustworthy. Your name, address, phone number, website, and service area should appear exactly the same everywhere, even down to abbreviations and punctuation. When these details match across directories, search engines gain confidence in your business data, which can improve your local search ranking. Consistency also prevents customer confusion and ensures that

anyone who finds your company through a third-party listing can contact you easily and accurately.

Here is a simple checklist for maintaining consistency throughout your online presence:

- Confirm your business name appears exactly the same on every platform, including abbreviations and punctuation.
- Verify your address, phone number, website URL, and service area match across all listings.
- Check your hours of operation are current and consistent.
- Ensure your business categories (e.g., "Garage Door Supplier," "Garage Door Repair Service") are correct and uniform.
- Update logos, photos, and branding so they reflect your current visual identity.
- Remove or correct duplicate listings that may confuse customers or search engines.
- Review customer facing descriptions to ensure they are accurate, up to date, and aligned with your services.
- Audit listings quarterly to catch changes made by platforms or user suggested edits.

These free listings expand your visibility, strengthen your credibility, and ensure your business is represented accurately everywhere customers may look for garage door services.

Online Directories

Online directories play a significant role in helping customers compare local service providers, and they remain one of the most influential discovery tools for garage door dealers. Platforms such as Yelp, Angi, HomeAdvisor, and local chamber-of-commerce directories allow homeowners to browse companies, read reviews, view photos, and evaluate service offerings before making

contact. Because these directories are widely used by consumers who are actively seeking home-service professionals, maintaining a strong presence on them can generate steady, high quality leads.

These platforms also serve as credibility builders. A complete and accurate profile with current contact information, service descriptions, photos of recent work, and verified customer reviews helps establish trust before a customer ever visits your website. Many directories also offer features such as request-a-quote forms, messaging tools, and service badges that make it easier for customers to reach out directly. For dealers, this means increased visibility in places where customers are already comparing options and making decisions.

Most directories allow businesses to enhance their listings through paid upgrades, but even the free versions can be highly effective when kept up to date. Consistency across directories is important: matching business information reinforces legitimacy and improves your visibility in local search results. Because these platforms often rank highly in search engines, a well maintained directory profile can help your company appear multiple times on the first page of results, increasing the likelihood that customers will choose you.

Reviews

Customer reviews are one of the most influential components of a company's online presence, and they play a major role in how homeowners choose a garage door dealer. Reviews provide social proof with real experiences from real customers that help potential buyers feel confident in their decision. Strong ratings and detailed feedback build trust, reinforce your professionalism, and differentiate your business from competitors who may have weaker or inconsistent

reputations. Because many customers check reviews before visiting a website or making a call, maintaining a positive review profile is essential for both credibility and lead generation.

Encouraging satisfied customers to leave reviews is an important part of this process. Simple steps such as sending a follow-up email after service, including a review link on invoices, or training technicians to ask for feedback can steadily increase the number of positive reviews you receive. The more recent and consistent your reviews are, the more trustworthy your business appears to new customers.

Responding to reviews is equally important. Thanking customers for positive feedback shows appreciation and reinforces goodwill, while responding professionally to negative reviews demonstrates accountability and a commitment to resolving issues. A thoughtful, calm response to criticism can often turn a negative impression into a positive one for anyone reading the exchange.

Reviews also influence how your business appears in search results. Search engines favor companies with strong, consistent ratings and active engagement, which can improve your visibility across platforms such as Google, Yelp, Angi, and HomeAdvisor. Because reviews are public and permanent, they serve as a long term asset that continues to shape customer perception over time. Ensuring that your review strategy is intentional, consistent, and customer focused helps strengthen your reputation and supports every other part of your digital marketing program.

Lead Aggregators and Online Marketplaces

Online lead-generation platforms such as HomeAdvisor, Angi, and Thumbtack remain

part of the modern advertising landscape. While they require careful cost management and prompt follow-up, they can provide a steady flow of leads, especially for new dealers or during slower seasons. These platforms allow customers to compare providers quickly, so maintaining strong reviews and a professional profile is essential. When used strategically, lead aggregators can supplement other advertising efforts and help stabilize workflow throughout the year.

Quick Response Codes (QR Codes)

QR codes are a type of matrix barcode that allows a smartphone to instantly open a website, display company information, or launch another digital action without requiring the user to manually type a URL. By scanning the code with a phone's camera, customers are taken directly to the intended online destination in a single step, making the process faster and more convenient than traditional web navigation.

This convenience has real marketing value. Reducing friction at the moment a customer shows interest increases the likelihood that they will follow through, whether that means visiting your website, scheduling service, downloading a coupon, or viewing a product page. By shortening the path between curiosity and action, QR codes help move prospects further down the conversion funnel with minimal delay or effort.

Businesses can generate QR codes easily using free online tools or built-in features within many website platforms. Most generators allow you to enter a URL, choose a design style, and download the code as an image file that can be placed on printed materials or digital content. For best results, link the QR code to a mobile friendly landing page and test it with multiple smartphones before publishing. Many platforms also offer trackable QR codes, which

provide analytics on how often the code is scanned. This can be useful for measuring the effectiveness of marketing materials such as brochures, invoices, or truck decals.

Dealers can place QR codes on business cards, invoices, brochures, trucks, showroom signage, direct mail pieces, and even yard signs at job sites. Each placement becomes a low cost, always available gateway that connects offline interactions to your online presence.

Newspaper

Newspaper advertising remains a useful option for local businesses because it can deliver either broad exposure or highly targeted reach, depending on the publication and its circulation. Community newspapers, neighborhood inserts, and suburban editions allow a dealer to focus on specific geographic areas, while larger regional papers provide wider visibility. For many door dealers, newspapers continue to be an effective medium for reaching retail customers, and many national manufacturers still offer coop reimbursement for qualifying newspaper ads.

A strong newspaper advertisement should include a clear call to action - something that gives the reader a reason to respond immediately. Offers such as "Receive a free wireless keyless pad with the purchase of an operator in January" or "Save \$25 on a fall safety inspection when you schedule in September" help motivate customers and tie your message to a specific timeframe.

The design of the ad is equally important. Newspaper readers scan quickly, so the layout should be clean, simple, and easy to interpret. Illustrations or product images paired with minimal, well-chosen text are more effective than cluttered ads that attempt to communicate too much in a small space. A straightforward

design ensures that your key message, offer, and contact information stand out.

Newspaper advertising can be purchased at an open rate or through a contract that guarantees the publication of a certain number of column inches over a set period. For reference, a full-page ad in many newspapers is six columns wide by 21 inches tall, totaling 126 column inches. Most newspapers will create the layout using the advertiser's content at no additional charge, making it easier for businesses to participate without needing in-house design resources.

Radio

Radio can be an effective advertising medium for local businesses because it reaches listeners in real time and allows advertisers to target specific audiences based on the station's programming format. Each station's format - news, talk, country, classic rock, sports, or contemporary hits - naturally attracts a distinct demographic. Choosing the right format is the single most important factor in ensuring your message reaches the customers most likely to need garage door service or replacement.

Radio also offers several practical strengths: a relatively low cost per thousand impressions, low production costs, and strong scheduling flexibility. Because airtime is generally more affordable than television or print, advertisers can purchase more spots over a longer period, increasing the number of times listeners hear the message. A station's signal strength and coverage area also help determine how far your message will reach, making it easier to match your advertising investment to your service area.

Most radio stations have on-air talent who can produce a 30 or 60 second commercial at little or no additional charge. Dealers may also have

access to preproduced, coop-approved commercials from their suppliers, which can be quickly adapted to fit a planned schedule. Radio's ease of production makes it convenient to update or replace ads when promotions change or when seasonal messaging is needed.

Writing an effective radio script requires imagination and attention to detail. Sound effects, background music, and distinctive voices help create an attention-getting spot that stands out from other ads. Because listeners cannot see your message, the script must be clear, memorable, and easy to follow, with a strong call to action that encourages the audience to contact your company.

A strong radio script needs to capture attention quickly, communicate clearly, and motivate listeners to act. These practices help ensure your message stands out and delivers results:

- **Lead With a Hook** - Start with a sound effect, question, or bold statement that grabs attention within the first two seconds.
- **Keep the Message Simple** - Focus on one main idea or offer; too many points dilute the impact.
- **Use Conversational Language** - Write the way people speak so the message sounds natural and easy to follow.
- **Highlight a Clear Benefit** - Explain what the listener gains, such as safety, convenience, savings, or fast service.
- **Include a Strong Call to Action** - Tell listeners exactly what to do next and make it time-sensitive when possible.
- **Repeat the Business Name** - Mention your company name at least twice to reinforce recall.
- **Use Sound Effects Strategically** - Garage door sounds, tools, or ambient cues can create context without overwhelming the message.
- **Match Tone to the Station Format** - A country station, news station, and classic

rock station each call for a different style and pacing.

- Keep Pacing Tight - A 30 or 60 second spot should feel energetic and purposeful, not rushed or cluttered.
- End With Contact Clarity - Provide a simple website or phone number that is easy to remember when heard once.

Internet Radio

Internet radio has become an increasingly important advertising channel because it allows businesses to reach highly specific local audiences through content-driven programming. Unlike traditional broadcast radio, internet radio platforms can target listeners based on geography, interests, listening habits, and even device type. This makes it especially appealing to tech-savvy consumers who prefer streaming audio over conventional radio.

As more listeners shift to digital platforms, internet radio continues to grow rapidly and is expected to influence how advertisers allocate budgets across traditional and digital media. For door dealers, it offers a flexible way to reach homeowners who are already engaged with online content and accustomed to interacting with digital ads.

Satellite Radio

Satellite radio advertising also offers the ability to target specific demographic groups, but its reach is primarily national rather than local. Because satellite radio broadcasts the same content across the entire country, it is less practical for businesses that serve a defined geographic area. While the demographic targeting can be precise, the broad geographic reach means much of the audience will fall outside a typical dealer's service territory. For this reason, satellite radio generally plays a

limited role in the advertising plans of most door dealers, who benefit more from media that can be focused on local homeowners.

Television

Television is one of the most powerful advertising media because it combines sight, sound, and motion. These elements combine to capture attention and communicate messages quickly and memorably. The average American watches several hours of television per day, and with DVRs and on-demand streaming of previously aired programs, viewers can access content whenever it fits their schedule. This habitual engagement makes television a strong platform for reaching broad audiences as well as specific demographic groups.

The expansion of cable and satellite television has created hundreds of channels competing for viewer attention, each with its own programming focus. This variety allows advertisers to target specific markets by selecting programs or networks that align with their ideal customer profile. For door dealers, this means the ability to place ads in time slots or on channels that attract homeowners in the right age and income ranges.

Television advertising is visually compelling, but it is also one of the more expensive media options. Production costs are higher, and the medium is less flexible than radio or digital advertising. Because commercials typically run in 30 or 60 second formats, the message must be crafted carefully to communicate the offer, brand identity, and call to action clearly and efficiently.

Choosing the right time slot is equally important, as different parts of the day attract different audiences. For example, adults ages 35 to 65, an important demographic for garage door services, are more likely to watch morning

news, early fringe programming, and evening newscasts.

Dealers who prefer not to manage the complexities of commercial production and media placement may benefit from working with an advertising agency. Agencies can craft professional, consistent messages and often negotiate better advertising rates. Their expertise can help ensure that the investment in television advertising delivers the strongest possible return.

One additional consideration is the logistics of cable advertising. Targeting a specific program or network may require working with multiple cable systems to cover your entire service area. If your cable representative cannot coordinate placement across all systems, the administrative workload increases, which is another reason some dealers choose to rely on agencies for this medium.

Local Publications

Local publications offer door dealers a valuable way to reach targeted audiences through high quality, long lasting print media. While hundreds of magazines and trade journals are published each year across consumer and business markets, most are distributed nationally or regionally. Local publications such as community magazines, regional builder or architectural journals, real estate guides, and chamber-of-commerce publications bring the message closer to the dealer's service area and often reach readers who are directly involved in home improvement decisions.

Magazines are particularly effective when the goal is to reach a specific, well-defined audience. Business focused publications can connect dealers with builders, architects, property managers, and other professionals who influence garage door selection. Consumer oriented local magazines often

reach homeowners who are actively engaged in home maintenance, remodeling, or real estate activity. Because these publications are typically read by people with a strong interest in their community, they can be an excellent platform for reinforcing brand recognition and showcasing premium product lines.

A key advantage of magazine advertising is its superior production quality. Higher grade paper stock and full color printing allow for vivid graphics and detailed photography - an ideal way to highlight the aesthetics of high end garage doors. A well-designed ad can visually communicate craftsmanship, curb appeal, and product variety in a way that other print media cannot match.

Magazines also offer a longer shelf life than newspapers or direct mail. Many issues remain in homes, offices, and waiting rooms for weeks or even months, giving your advertisement repeated exposure to new readers over time. This extended visibility makes magazines a strong choice for promoting top-tier products, seasonal features, or brand building messages that benefit from sustained attention.

HOA and Neighborhood Newsletter Advertising: Homeowner associations frequently publish newsletters or digital bulletins that accept low cost advertising. These publications reach homeowners directly and often outperform broader print media because the audience is tightly defined and highly relevant. Advertising seasonal tuneups, safety inspections, or showroom visits in HOA newsletters can generate steady leads, especially in communities with older homes or higher end properties. Some HOAs also allow door hangers or community wide mailers, providing additional opportunities for targeted outreach.

Direct Mail

Direct mail has seen a resurgence as an advertising tool, largely because consumers now receive far less physical mail than in past decades. With less competition in the mailbox, a well-designed mail piece stands out more easily and can capture attention quickly. Unlike glossy magazines or long-form print media, direct mail is especially well suited for time limited promotions, seasonal service specials, and targeted offers that encourage immediate action.

One of the greatest strengths of direct mail is its ability to reach specific audiences in precise geographic areas. Dealers can target particular neighborhoods, ZIP codes, income ranges, homeowner segments, or choose to mail to every household within a defined service area. This makes direct mail an effective way to promote tuneups, safety inspections, new door sales, or limited time discounts exactly when and where they are most relevant.

Direct mail comes in several formats, each with different advantages. Some rely on shared advertising products, where multiple businesses appear in a single mailer, reducing cost while still reaching a broad audience. Others use business initiated distribution, where the dealer sends postcards, letters, flyers, or oversized cards directly to selected households. Dealer initiated mailings offer more control over design, branding, and messaging, and they allow for stronger calls to action tailored to the company's goals.

Because direct mail can be timed precisely, it is ideal for seasonal reminders, promotional pushes, or campaigns tied to weather patterns or local events. Many dealers pair direct mail with digital elements such as QR codes or trackable URLs to measure response rates and connect offline outreach with online engagement.

Reaching the Right Audience: Building an effective mailing list is central to any successful direct mail campaign, and dealers have several reliable ways to assemble one. Using your existing customer base is often the most productive starting point. Past customers already know your company, and mailings to this group typically generate higher response rates than broad, untargeted campaigns. These customers are also more receptive to seasonal reminders, service specials, and upgrade offers.

Dealers can also purchase mailing lists from direct mail marketing companies. These lists can be filtered by key demographic factors such as income level, homeownership status, age, ZIP code, or even the age of the home. This allows you to target households most likely to need garage door service or replacement. Costs vary depending on the level of demographic filtering, the size of the list, and whether the vendor handles printing, labeling, postage, lead distribution, and tracking. Dealers with in-house administrative support can reduce expenses by applying labels themselves or preparing the mail pieces internally.

A well-maintained mailing list is a long-term asset. Regular updates help remove duplicates, correct addresses, and ensure that your message reaches the right households. Over time, a clean and accurate list improves response rates and reduces wasted postage.

Direct Mail Tips:

- Define Your Market - Identify the geographic areas and customer segments most likely to need your services.
- Maintain and Update Your Mailing List - Keep it accurate, current, and free of duplicates.
- Mail Multiple Times Per Year - Repetition builds recognition and increases response rates.

- Address the Mailing to a Specific Person - Personalized mail is more likely to be opened.
- Include a Strong Offer - Give recipients a clear reason to respond now.
- Keep the Piece Easy to Read - Simple layouts and clear messaging outperform cluttered designs.
- Follow Up When Possible - A phone call or email shortly after mailing can boost conversions.
- Time the Mailing Strategically - Send it when customers can use the offer and your team can handle the responses.
- Provide a Simple Response Method - Include a reply card, coupon, QR code, or easy-to-remember phone number.
- Measure Results - Track response rates and geographic patterns to refine future campaigns.

Trade Shows

Trade shows can be one of the most effective ways for door dealers to connect directly with potential customers. Unlike most advertising channels, trade shows create a face-to-face environment where visitors can see, touch, and compare products in person, much like an off-site extension of your showroom. This personal interaction builds trust, allows for real time education, and generates high quality leads from homeowners who are already thinking about home improvement.

Successful trade show participation begins with clear objectives. Dealers typically use trade shows to:

- Increase sales and generate qualified leads
- Introduce new products or services
- Educate consumers about safety, maintenance, and product options
- Strengthen brand recognition and project a professional image

Planning should begin months in advance. Many shows allow exhibitors to reserve space for the following year during the current event, which means budgeting decisions often occur well ahead of the next season.

Key budget considerations include booth space, display materials, staffing, promotional items, and show services such as electricity, internet, or material handling.

Effective preparation ensures that your booth, staff, and materials work together to create a strong impression. Important steps include:

- Designing the booth and selecting displays, literature, and giveaways that reflect your brand and highlight your best products.
- Assigning employees for setup, takedown, and booth staffing, and holding staff meetings to clarify goals and expectations.
- Coordinating with suppliers to secure literature, samples, and displays in time for the event.
- Developing show specific incentives such as limited time discounts, free accessories, or complimentary removal of old equipment. Offers available only at the show.
- Promoting your participation through your website, social media, email lists, and local advertising, and submitting any required program ads to the show organizers.
- Ensuring professional appearance, including branded shirts or attire that reinforces your company identity.
- Conducting a post-show review to evaluate performance, lead quality, and opportunities for improvement.
- Following up promptly with leads through calls, emails, or site visits to convert interest into sales.

The most important element of your trade show presence is the team representing your company. Staff should be enthusiastic, approachable, and knowledgeable about products and services. Their role is to engage

visitors proactively, ask questions to understand customer needs, demonstrate products clearly and confidently, capture lead information accurately, and encourage next steps, such as scheduling an estimate or showroom visit. A well-trained, energetic team can turn a steady flow of visitors into a strong pipeline of future business.

Measuring ROI helps determine whether a trade show is worth repeating and how well it performs compared to other marketing channels. The most direct approach is to track the number of leads collected, how many convert into estimates, how many of those estimates become sales, and the total revenue generated. Comparing that revenue to the full cost of participation, including booth fees, display materials, staff time, travel, and promotional items, provides a clear financial picture. Many dealers also calculate cost per lead and average revenue per lead to evaluate efficiency.

Qualitative factors matter as well. Strong conversations, high booth traffic, increased brand visibility, and new relationships with homeowners or builders can all add value beyond immediate sales.

A simple formula for ROI:

$$ROI = \frac{Revenue - Cost}{Cost}$$

This can help to summarize results, but the long term brand impact and follow up opportunities often influence whether a show remains part of the annual plan.

Outdoor Advertising

Outdoor advertising offers a steady, low cost way to keep your company visible in the community and reinforce brand recognition. Although it represents a relatively small share

of total advertising spending, it excels at creating repeated impressions - those quick, memorable exposures that keep your name top-of-mind when a homeowner eventually needs garage door service or replacement.

Billboards remain the most common and effective form of outdoor advertising. Positioned along highways and busy streets, they guarantee visibility and cannot be skipped, muted, or turned off like other media. Because many people travel the same routes daily, a billboard delivers repeated exposure to the same audience, strengthening recall over time. Modern technology has expanded billboard options beyond traditional two-dimensional designs. Three-dimensional elements, extensions, and LED digital boards increase visibility and help your message stand out in crowded environments.

Outdoor advertising works best when it supports a broader, multi-media strategy. Space is limited, so messages must be simple, bold, and instantly understood. A few well-placed billboards across a local market can blanket the community with your brand, but they are most effective when paired with complementary advertising in print, digital, or broadcast media.

Some of the most valuable outdoor signage a dealer can invest in is the signage on the company's own building and service trucks. These assets travel through neighborhoods, sit in driveways during service calls, and serve as constant reminders of your presence in the community. Prominent, professional signage that incorporates your company logo reinforces the brand identity you've built across all other advertising channels and helps create a consistent, trustworthy image.

Some advertising services now offer GPS-triggered mobile ads that display digital promotions to homeowners in the neighborhoods where your service trucks are

currently working. This approach reinforces brand presence by connecting physical visibility with digital impressions. When a homeowner sees your truck on their street and later receives an online ad for your company, the combined exposure increases recognition and trust. This method is particularly effective for promoting tuneups, safety inspections, and same day service.

In addition to billboards, many communities offer transit-based advertising, such as ads on buses, bus shelters, benches, and commuter rail stations. These placements reach homeowners during daily routines and often allow for highly localized targeting. Because transit ads are viewed repeatedly by the same commuters, they can reinforce brand recognition in a cost effective way, especially in suburban markets where bus shelters and benches sit along heavily traveled roads.

Another option is yard signs and jobsite signage, which are particularly effective for door dealers. A simple, well-designed sign placed at a customer's home during or after an installation showcases your work to neighbors who may be considering similar upgrades.

Community bulletin boards, shopping center kiosks, and local sports field signage also provide low cost visibility in areas where homeowners gather. These smaller formats help extend your brand presence and complement larger billboard or vehicle based advertising.

Showroom

A showroom remains one of the most powerful tools a door dealer can use to influence purchasing decisions. While many consumers begin their research online or through word-of-mouth, major purchases, such as automobiles, appliances, and garage doors, still benefit from in-person evaluation.

Customers want to see the product, understand the differences between models, and speak with a knowledgeable professional before committing. A well-designed showroom provides that environment and reinforces the credibility and professionalism of the business.

A showroom gives customers the chance to compare styles, materials, insulation levels, and construction quality up close. Seeing full size doors, color samples, and hardware options helps homeowners visualize how a new door will enhance curb appeal and increase perceived home value. This hands-on experience often leads customers to choose higher end products once they understand the differences and can picture the upgrade on their own home. A skilled sales professional can guide them through these options, answer questions, and help them feel confident in their decision.

Manufacturers increasingly support dealers by offering high quality display pieces, sample sections, and digital tools. Visualization software allowing a customer to upload a photo of their home and preview different door styles has become especially effective. These tools help bridge the gap between imagination and reality, making it easier for customers to select a door that complements their home's architecture and color scheme.

Once a dealer invests in a showroom, promoting it becomes essential. Advertising the showroom across all marketing channels encourages customers to visit in person. Many dealers report that once a customer walks through the showroom, the likelihood of upselling to premium products increases significantly. Customers often discover that higher end doors are more affordable than expected and offer long term value in appearance, durability, and energy efficiency.

A well-designed showroom should guide customers naturally from curiosity to

confidence, helping them understand product differences and envision upgrades in their own homes. These practices strengthen the customer experience and increase the likelihood of higher end sales.

Best practices for a high quality showroom are:

Show a Curated Range of Full Size Doors -

Display contrasting styles, materials, and insulation levels so customers can immediately see and feel the differences. A mix of good-better-best options helps anchor value and encourages natural upselling.

Use Clean, Organized Zones - Group displays by product category (carriage house, contemporary, traditional, insulated, specialty) so customers can explore without feeling overwhelmed. Clear signage and simple explanations help them compare options quickly.

Integrate Digital Visualization Tools -

Provide a workstation or tablet where customers can upload a photo of their home and preview different door styles. This bridges the gap between imagination and reality and often leads to higher end selections.

Highlight Hardware, Windows, and Finishes

- A dedicated area for handles, hinges, window inserts, and color samples allows customers to customize their door and understand how small upgrades affect appearance and price.

Demonstrate Operators and Accessories -

Let customers hear operator noise levels, see smart home features, and test accessories. Hands-on demonstrations make premium operators and addons easier to justify.

Keep Space Bright, Clean, and Professional

- Good lighting, uncluttered displays, and branded decor reinforce trust and signal quality. A showroom should feel like an extension of the company's reputation.

Train Staff for Consultative Selling - Sales professionals should guide customers through

needs, wants, preferences, and budget, helping them understand value rather than pushing a specific product. Knowledgeable, friendly staff are often the deciding factor in higher margin sales.

Make Pricing Transparent and Easy to Understand - Provide clear price ranges or sample quotes so customers can compare options without confusion. Transparency builds trust and reduces hesitation.

Driving traffic to the showroom is essential because once customers see full size doors, compare options, and speak with a knowledgeable professional, the likelihood of choosing higher end products increases significantly. Promotion should be woven into every advertising channel so the showroom becomes a central call to action rather than an afterthought. Your website, social media, direct mail, radio spots, and print ads should all highlight the value of an in-person visit. Using phrases like "See it in our showroom," "Compare full size doors side by side," or "Visit our design center" help set the expectation that the best experience happens on site. Featuring photos or short videos of the showroom on digital platforms also helps customers visualize what they'll find when they arrive.

Local marketing can reinforce this message. Yard signs, jobsite signage, and vehicle graphics can include a simple line inviting homeowners to visit the showroom. Email campaigns and seasonal reminders can promote showroom-only specials or design consultations. Many dealers also find success by offering small incentives such as a free upgrade, extended warranty, or accessory discounts for customers who schedule a showroom appointment. These strategies position the showroom as the natural next step in the buying process and help convert general interest into committed, in-person engagement.

Public Relations

Public relations and community engagement offer some of the most cost effective ways for a door dealer to build credibility, visibility, and long term trust. These opportunities require more initiative than money, and they often produce results that paid advertising cannot match, especially when they position your company as the knowledgeable, reliable expert in your market.

Contributing educational articles to local newspapers is one of the strongest free publicity tools available. Many papers publish seasonal home improvement sections in spring and fall, and editors are often eager for practical, homeowner focused content. Articles explaining garage door safety, maintenance tips, or the benefits of upgrading to modern operators help inform the public while subtly reinforcing your expertise. Dealers who prefer not to write their own content can often obtain ready-made articles from manufacturers and suppliers, with space to add their company name as the local authority.

Establishing your dealership as the expert in the community strengthens your brand far beyond what paid ads can accomplish. Earning IDEA Accreditation is a powerful credential, and once achieved, it should be used consistently in your marketing and public relations efforts. Accredited dealers can make themselves available to local media for commentary on safety issues, weather related concerns, or home improvement trends. A brief television interview or a quote in a newspaper article provides credibility that money cannot buy and positions your company as a trusted voice in the industry.

Public speaking opportunities also reinforce your authority. Presentations to local boards of realtors, homebuilders' associations, or community groups allow you to educate professionals about curb appeal, energy

efficiency, and proper door system maintenance. These sessions help realtors sell homes more effectively and help builders stay informed about new products and safety standards. For commercial work, conversations with architects and general contractors about emerging technologies or updated regulations can lead to product specifications that give your company a competitive advantage.

Community involvement is another form of free advertising that builds goodwill and strengthens your reputation. Participating in projects such as Habitat for Humanity, local service clubs, or community improvement initiatives highlights your company's values and positions your employees as active contributors to the community. These activities create positive associations with your brand and often lead to word-of-mouth referrals from people who appreciate your involvement.

Sponsoring youth sports teams, school programs, charity events, or community festivals provides repeated exposure through banners, programs, and event signage. These sponsorships are often inexpensive and create positive associations with your company. Participating in local events such as home shows, safety fairs, or community clean-ups also reinforces your presence as a trusted local business. Over time, these activities contribute to strong word-of-mouth referrals and increased brand loyalty.

Referral and Partner Advertising

Partnership based advertising leverages the trust that already exists between homeowners and other professionals. Realtors, home inspectors, remodelers, and small builders often need reliable door dealers for quick repairs or replacements. Providing these partners with brochures, cobranded materials, or priority scheduling can generate consistent referral business. For commercial work,

maintaining relationships with architects and general contractors ensures your company is considered for specifications and bid opportunities. These partnerships often produce high quality leads because they come with built-in credibility.

Selling with IDEA Credentials

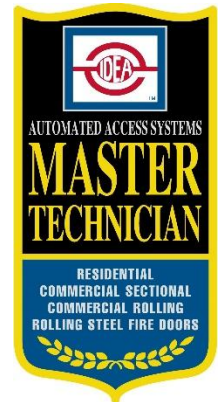
IDEA credentials give a door dealer one of the strongest differentiators available in a competitive marketplace. When a company promotes its IDEA Accreditation and technician Certifications, it signals to homeowners, builders, and commercial clients that its staff has met rigorous, industry recognized standards. These credentials validate technical competence, safety knowledge, and professional integrity, all qualities that customers often assume but rarely verify without a trusted third-party endorsement. In an industry where many consumers struggle to distinguish one dealer from another, IDEA credentials provide a clear, credible reason to choose an Accredited and/or Certified professional.

The Institute of Door Dealer Education and Accreditation (IDEA) is an independent, non-profit educational foundation supported by the industry's leading associations. Its mission is to elevate professionalism through structured education, testing, and ongoing competency requirements. In addition to Dealer Accreditation, IDEA offers a comprehensive suite of certifications that cover the full range of residential, commercial, and automated gate systems:

- Residential Installer Certification
- Commercial Sectional Door Systems Technician Certification
- Commercial Rolling Door Systems Technician Certification
- Rolling Steel Fire Door Technician Certification

- Automated Gate Operator Installer Certification
- Automated Gate Systems Designer Certification
- Certified Automated Gate Systems Technician Levels 1, 2, and 3
- Advanced Overhead Door Operator Technician Certification
- Certified Door Dealer Consultant (for manufacturer sales representatives)

Door systems technicians who earn certification in Residential Installer, Commercial Sectional Door Systems, Commercial Rolling Door Systems, and Rolling Steel Fire Door programs achieve the distinguished designation of **Automated Access Systems Master Technician**. This title recognizes comprehensive expertise across the full range of residential and commercial door systems.



Likewise, gate systems technicians who complete the Automated Gate Operator Installer and Automated Gate Systems Technician Levels 1, 2, and 3 certifications attain the status of **Automated Gate Systems Master Technician**, reflecting advanced proficiency in the design, installation, and safety requirements of automated gate systems.



Technician certifications demonstrate that individuals have mastered the technical, safety, and code compliance knowledge required to work on complex door, gate, and operator systems. These programs have grown significantly in recognition, and several states now require IDEA certification for licensing. Commercial specifications increasingly call for certified technicians as well, giving

credentialed dealers a competitive advantage in bidding and project qualification. IDEA credentials strengthen every stage of the sales process. They build trust during initial contact, reinforce professionalism during estimates, and provide reassurance when customers compare competing proposals. Accreditation and certification also support higher pricing integrity - customers are more willing to invest in quality when they understand that trained, certified professionals will perform the work. For commercial clients, credentials can be the deciding factor in meeting bid requirements or qualifying for specialized projects. For residential customers, they offer peace of mind that the dealer adheres to industry best practices and safety standards.

Dealers who actively promote their IDEA credentials on websites, proposals, uniforms, vehicles, and showrooms consistently report stronger close rates and higher average tickets. The credentials become part of the company's brand story: a visible commitment to education, professionalism, and excellence.

Selling Accreditation

Using IDEA Accreditation effectively is essential to realizing its full value. While Accreditation is an educational process similar to technician certification, its primary strength lies in what it communicates to the marketplace: an independent, third-party validation of a company's professionalism, technical competence, and commitment to customer service. This credibility advantage only works when the Accredited Door Dealer actively incorporates the credential into everyday sales and marketing activities.



Accredited dealers have developed several proven strategies for leveraging this distinction:

- Display the IDEA Accreditation logo on brochures, letterhead, business cards, invoices, service trucks, uniforms, and signage to reinforce professionalism at every customer touchpoint.
- Use IDEA countertop flyers and point-of-purchase materials in showrooms and trade show booths to provide visible, third-party validation during in-person interactions.
- Reference Accreditation across all advertising channels, including websites, social media, television, radio, print, and outdoor signage, to strengthen brand credibility.
- Include a brief explanation of Accreditation in quotes and proposals so customers understand what the credential represents and why it matters.
- Incorporate Accreditation into point-of-sale conversations, explaining that it reflects independent verification of your company's quality standards, safety practices, and customer-service commitment.

Unlike technician certifications, which are awarded to individuals, IDEA Accreditation is issued to the company. This distinction signals that owners, managers, and employees collectively uphold the standards of a professional, customer focused organization. Dealers who consistently promote their Accredited status report stronger close rates, higher customer confidence, and improved differentiation from competitors. The impact of Accreditation grows in direct proportion to how visibly and consistently it is used throughout your marketing and sales efforts.

The Key to a Successful Advertising Campaign

A successful advertising campaign is built on careful planning, consistent execution, and

disciplined budgeting. Advertising is not simply an expense; it is an investment in the professional image and long term growth of your company. The more intentional you are in selecting your media, defining your message, and allocating your resources, the more effectively your advertising will support your business objectives.

Tracking the results of each advertising effort, whether through sales, lead sources, showroom visits, or seasonal trends, allows you to evaluate which methods deliver the strongest return. With this information, you can refine your strategy, shift spending where it is most productive, and ensure that your advertising dollars are being used wisely.

Consistency remains one of the most important elements of any advertising plan. Marketing experts often note that disappearing from the public eye for weeks or months can cause a business to lose valuable name recognition, forcing you to rebuild awareness that had already been earned. Maintaining a steady presence through digital channels, print, outdoor media, or community engagement helps keep your company top-of-mind when customers need garage door service or replacement. Even modest, well-timed advertising can be effective when it is sustained throughout the year. By planning your advertising calendar in advance and staying within your budget, you can create a reliable, year-round presence that reinforces your brand and supports ongoing growth.

Section Three

The Commercial Construction Process

Commercial construction operates within a structured, highly competitive environment where projects are awarded not by casual negotiation, but through a formal bid process designed to ensure fairness, transparency, and cost control. For door dealers, understanding this process is essential. Commercial work often represents larger contracts, longer timelines, and more complex specifications than residential jobs, and success depends on knowing how projects move from design to bidding to award. Dealers who understand the expectations of architects, general contractors, and construction managers are better positioned to submit accurate proposals, avoid costly mistakes, and secure profitable work.

At its core, the commercial bid process is a sequence of coordinated steps: architects prepare plans and specifications, general contractors assemble bids from subcontractors, and owners evaluate proposals based on price, qualifications, and compliance with project requirements. Each stage introduces its own responsibilities for the door dealer such as reviewing bid documents, identifying scope, clarifying conflicts, pricing materials and labor, and submitting complete, timely proposals. Because commercial projects often involve multiple trades, strict deadlines, and detailed technical requirements, even small oversights can affect profitability or disqualify a bid.

Navigating this process effectively requires more than simply providing a price. It demands familiarity with construction documents, an understanding of how addenda and revisions affect scope, and the ability to communicate clearly with general contractors and project managers. Dealers who master these skills not only improve their chances of winning bids, but

also build a reputation for reliability and professionalism - qualities that lead to repeat business and preferred vendor status.

As you move through this section, you will gain a clear understanding of how commercial projects are structured, how bid opportunities are created, and how to position your company for success in a competitive commercial marketplace.

The Commercial Bid Take Off

The commercial bid takeoff begins with obtaining the most current and complete set of bid documents, including all drawings, specifications, addenda, and alternates. These documents are typically available through general contractor and project architect websites, as well as industry platforms such as:

- Dodge Report – dodgeprojects.construction.com/
- Reed Construction – insight.reedconstructiondata.com/
- iSqFt – isqft.com/start/
- The Blue Book – thebluebook.com/
- Building Permits – Find private work that is not advertised.
- Traditional marketing to General Contractors (GC) – Ask GCs to be added to their RFP or Bid List. By contacting local GCs and presenting a company resume complete with a reference list of successfully completed projects, contractor's license number, insurance certificates, bonding capacity, and other qualifications.

Always record the date and version of the documents you download to ensure you are working from the latest information.

Once the documents are secured, review the General Conditions carefully. These sections outline requirements that may significantly affect your ability to bid or perform the work. Note all obligations related to bonding, safety programs, union labor, project schedules, special insurance, material substitution procedures, and participation goals for Women-, Minority-, Disadvantaged-, or Veteran-owned businesses. Any of these requirements may disqualify your company or require adjustments to your pricing and planning.

Next, conduct a detailed review of all drawings and specifications that relate to the door scope of work. This includes the overhead door specification section (typically 083300), the door schedule, window schedule (which may include counter shutters), door details such as head and jamb conditions, floor plans showing each opening, building sections and elevations, and electrical plans and panel schedules that identify motor operator requirements.

Addenda and all instructions to bidders must also be reviewed, as they often contain critical clarifications or changes. As with the General Conditions, certain requirements found in these documents may preclude your company from bidding.

During the takeoff, document every relevant detail for each opening: the number of doors, sizes, types, materials, finishes, operation method, voltage and phase for motorized units, and any special installation or equipment requirements. Examples include doors located on upper floors or in basements, unusually large openings, projects with multiple phases, or jobs requiring staggered material releases. These factors directly affect labor, equipment, scheduling, and overall cost.

Finally, identify and record all errors, omissions, and conflicts within or between the plans and specifications. Discrepancies

between schedules and floor plans, missing structural support details, unclear electrical requirements, or conflicting door types are common in commercial projects. Documenting these issues early allows you to seek clarification before submitting your bid and helps protect your company from costly misunderstandings later.

Estimating and Bid Preparation

The estimating and bid preparation process begins with gathering accurate pricing for every component included in the scope of work. Obtain material quotes from all relevant suppliers, ensuring that each quote reflects the correct specifications, quantities, finishes, and performance requirements shown in the bid documents.

Once material pricing is confirmed, estimate the labor and equipment needed to complete the project. This estimate should account for installation time, travel, mobilization, equipment rentals, and any unique site conditions that may affect productivity. Be sure to include all applicable sales tax, overhead expenses, special insurance costs, and the markup or profit margin required to meet your company's financial goals.

It is essential to incorporate the costs of any special project requirements identified during the takeoff. These may include prevailing wage or union labor rates, night or weekend work, expedited delivery, enhanced insurance coverage, or bonding requirements. General contractors expect your bid to clearly state whether these items are included, and failing to account for them can significantly impact profitability or disqualify your proposal.

After completing the estimate, prepare a concise one-page bid document. This document should reference the specification sections included in your scope, list the lump-sum bid amount, and identify the type, number, and size of the doors being provided.

When appropriate, include additional details such as material and finish, operation type, and any special project requirements or clarifications. A clear, well-organized bid document not only communicates your price but also reinforces your professionalism and reduces the likelihood of misunderstandings during the award process.

Substitutions

Substitution requests are governed by the project's General Conditions, specifically specification section 016300, which outlines whether substitutions are permitted and under what circumstances. Because this section may allow, restrict, or completely prohibit substitutions, it must be reviewed carefully - along with the door specification section (083300) - before beginning a full takeoff. When substitutions are allowed, section 016300 will define the exact procedures and timeframes for submitting requests, which may occur either before the bid or after award, depending on the project. Understanding these requirements early ensures that any proposed alternate products or manufacturers are submitted properly and considered in accordance with the contract documents.

Request for Information

A *Request for Information (RFI)* is the formal tool used to resolve errors, omissions, and conflicts before product submittals are issued. In *Hard/Open Bid* projects especially, the RFI serves as the official record for raising questions and obtaining direction from the architect or GC. Along with change orders, RFIs are the documents used to modify or clarify the plans and specifications, and they protect all parties by ensuring that decisions are documented in writing.

An effective RFI clearly identifies the issue and provides enough information for the design team to respond without delay.

Each RFI should include:

- A reference to the specification section, drawing number, or detail and a brief description of what is shown or called out.
- An explanation of the error, omission, or conflict, such as discrepancies between drawings and specifications or requirements that are not commercially feasible.
- A recommended solution, including why it is appropriate or necessary for the project.
- Supporting documentation, such as product data, corrected details, or return-on-investment information when applicable.
- A separate explanation for each issue, ensuring clarity and preventing multiple unrelated questions from being combined into a single request.

A well-written RFI not only resolves the immediate issue but also demonstrates professionalism and reinforces the door dealer's role as the technical expert on the project.

Project Types and Bid Methods

Understanding how commercial construction projects are procured is essential to preparing accurate bids and positioning your company effectively. General contractors and building owners use several different methods to solicit pricing, each with its own expectations, timelines, and levels of competition. Knowing the type of project you are bidding and how decisions are made within that structure helps you tailor your proposal, anticipate requirements, and avoid costly misunderstandings. The following sections outline the primary project types and bid methods you will encounter in commercial construction.

Hard/Open Bid Projects

Hard bid or *open bid* projects involve multiple general contractors submitting lump-sum

proposals to manage the construction of a project. These projects typically include comprehensive and detailed contract documents - architectural plans, specifications, and all related addenda - which are made available through sources such as Dodge, REED, and other bid platforms. Public works and government projects are most commonly procured through this method.

Door subcontractors may be invited to bid by one or more general contractors, or they may locate the project and the list of bidding GCs through Dodge, REED, or similar services.

When bidding hard bid projects, it is essential to understand that general contractors expect the door subcontractor to cover the entire scope of work as defined in the specification section. Excessive exclusions give the GC reasons to avoid using that subcontractor.

If errors, omissions, or conflicts are discovered in the plans or specifications, it is standard practice to submit these issues before the bid date. When the bid date is more than 14 business days away, RFIs should be submitted to the architect. If the bid date is less than 14 days away, subcontractors typically submit RFIs to the GC who is ultimately awarded the project.

Negotiated Bid Projects

In negotiated projects, the building owner selects a single general contractor and negotiates the price, scope, and terms directly with that GC. The GC then solicits bids from at least three subcontractors for each trade. New car dealerships are a common example of negotiated projects.

Negotiated projects generally fall under one of the following terms:

- **Guaranteed Maximum Price (GMP)** - The GC must deliver the project for a fixed maximum price. If the project comes in under budget, the GC retains the savings.

- **Fee Based** - The owner reviews all subcontractor bids and works with the GC to select subcontractors, typically awarding most work to the lowest qualified bidder. The GC is paid a set percentage fee based on total construction costs.

For negotiated projects, the GC expects subcontractors to submit all questions, errors, omissions, or conflicts before submitting their bids. These issues should be submitted as formal RFIs, and GCs prefer to receive them with or prior to the subcontractor's proposal.

Design/Build Bid Projects

In design/build projects, the general contractor is responsible for both designing and constructing the building. These projects may be procured as open bids, where multiple GCs submit their design concepts and pricing, or as negotiated projects with a single selected GC.

Before bidding any commercial project, subcontractors should determine the project type and adjust their approach accordingly. This information is typically available simply by asking the GC.

Bid Results and Bid Tabs

Door contractors can gain valuable insight and strengthen relationships with general contractors by requesting bid results or *bid tabs* for their scope of work. Reviewing these results helps subcontractors understand market pricing, evaluate competitiveness, and identify opportunities for future collaboration.

Contract Award

During the award phase, the building owner reviews the general contractors' bids, meets with the lowest qualified bidders, typically the first and second lowest, and evaluates their scope, qualifications, and any clarifications they wish to make. After this review, the owner awards the contract to the selected GC. During

this period, the lowest-priced GCs (#1 and #2) generally avoid inquiries from bidding subcontractors, while the third and fourth lowest bidders are often more willing to share bid results with door contractors.

Once the project is awarded, the GC begins issuing subcontracts to the qualified low-bid subcontractors. Awards usually start with site work and other major scopes. Door subcontractors should follow up promptly with the GC to secure their subcontract and begin planning for the project as early as possible.

When awarded a subcontract, it is essential to obtain the most recent *For Construction* plans and specifications. Significant changes often occur between the *For Bid* and *For Construction* sets, and the subcontract will reference the specific revision date that governs the work. The door subcontractor must obtain this exact set and perform a second, complete takeoff to identify any differences. This ensures that the subcontractor is pricing and performing work based on the correct documents.

A scope and contract review meeting with the GC is an important step. Even if the subcontract is issued before such a meeting, the door subcontractor should request the opportunity to review the scope, contract language, and project schedule. For *Hard/Open Bid* projects, this meeting is the appropriate time to present all errors, omissions, and conflicts identified during both the initial takeoff (*For Bid* set) and the second takeoff (*For Construction* set). Be prepared to explain each issue and propose solutions. Any solution that carries additional cost should be discussed openly. In *Hard/Open Bid* projects, additional costs resulting from document errors or omissions should be the responsibility of the building owner, and it is important to ensure the GC understands and agrees with this position.

Before signing the subcontract, review all insurance requirements carefully. Provide your insurance certificates to the GC and obtain written confirmation that your existing policies meet the project requirements. Documenting

this acceptance is critical, as progress payments may be withheld if insurance requirements are later disputed, and some GCs may attempt to require more expensive insurance or umbrella policies mid-project.

Also before signing, submit all required safety programs, security clearances, union documentation, Women / Minority / Disadvantaged / Veteran business certifications, and drug testing policies. Confirming acceptance of these items in writing helps prevent delays in future progress payments.

Finally, request a reduction or elimination of retainage. Standard retainage is 10% of the contract amount, but for smaller scopes of work, GCs will sometimes agree to reduce it to 5% or remove it entirely. Securing this adjustment can significantly improve project cash flow.

Project Management

Time to be the expert. Project management begins the moment the subcontract is executed, and at that point the door dealer becomes an active member of the construction team. The subcontract establishes the dealer as the door expert for the scope of work, which carries a professional obligation to identify and resolve all errors, omissions, and conflicts within the contract documents. These issues may arise from inconsistencies between the plans and specifications, or from discrepancies between what is shown on the documents and what is commercially available.

For example, a specification that states “provide vertical lift track for all coiling doors” is technically impossible, and it is the dealer’s responsibility to bring such conflicts to the GC’s attention.

Acting as the expert also means applying industry knowledge and experience to evaluate whether the specified products are appropriate for the application. If anything appears incorrect, impractical, or unsuitable, the

subcontractor must notify the GC and recommend a solution.

A common example is a standard cycle door specified for a parking structure. If the door will cycle hundreds of times per day, a high cycle product is required; if it will open once in the morning and close once at night, a standard cycle door may be acceptable.

Regardless of the final determination, the expert must raise the question. This protects the building owner, the GC, and the subcontractor, and ensures that the final installation meets the operational needs of the project.

Coordination

Coordination is a core responsibility once the project moves into execution, because nearly every commercial door opening interacts with multiple other building systems and trades. The plan details, especially the door head and jamb details, wall elevations, wall sections, building elevations and sections, kitchen equipment layouts, and electrical power plans and panel schedules, must be reviewed carefully to identify all trades involved at or around each opening. These may include structural steel, masonry, drywall, fire protection, electrical, mechanical, kitchen equipment, glazing, and finish trades. Understanding how each trade affects the door installation allows the door subcontractor to anticipate conflicts, request clarifications early, and ensure that required supports, clearances, and utilities are provided before arriving on site.

Effective coordination improves installation efficiency, reduces rework, and prevents costly delays. It also strengthens the subcontractor's reputation with general contractors and architects, who rely on proactive communication to keep the project on schedule. Strong coordination practices, especially early identification of conflicts and clear communication of requirements, can significantly improve both profitability and long term relationships with project partners.

Clearances

Clearances must be communicated clearly and early so the GC, and all related trades, understand the full footprint of the door system and the space required for proper, safe installation. Coordination documents should show the headroom, sideroom, backroom, and any operational clearances needed for tracks, operators, safety devices, and service access.

These requirements should also be verified during onsite field checks to confirm that structural elements, mechanical systems, electrical conduits, fire protection piping, and other building components do not interfere with the door's installation or operation. Properly documented clearances prevent conflicts, reduce rework, and ensure that the installed system performs as intended.

Access

Access requirements must be clearly communicated so the GC and other trades understand how future maintenance, service, and warranty work will be performed. Door systems often include components such as operators, drive assemblies, tensioning devices, and safety equipment that require periodic inspection and repair. When these components are concealed within walls, ceilings, soffits, or architectural features, the door subcontractor must identify the access needed and recommend appropriate solutions. This may include access panels, removable ceiling or wall sections, or dedicated service openings that allow technicians to safely reach all equipment without damaging finished surfaces.

Submittals

Submittals are the formal documents, product data, drawings, samples, and technical information that subcontractors must provide after the contract is awarded. These documents allow the architect and GC to verify that the

materials and equipment you intend to furnish match the specifications and plans.

Submittals are governed by the project's General Conditions, specifically specification section 013300, which outlines the required format, content, and procedures for all submittals. The door specification section (083300) may include additional or more detailed requirements that must also be followed.

For most projects, all submittals must first be reviewed and approved by the general contractor before they are forwarded to the architect. If any required information from section 013300 is missing, the GC is obligated to return the submittal to the subcontractor for correction, which delays the approval process.

Once the architect receives the submittal, they compare it directly to the project specifications and plan details to verify compliance. This is why it is essential to resolve all errors, omissions, and conflicts through the RFI process before preparing submittals. Unresolved issues can cause confusion during the architect's review and may result in rejections, delays, or incorrect assumptions. When RFIs have been answered, the responses should be included in the submittal package to clearly document any approved variances from the plans or specifications.

The submittal process is time and resource intensive for the subcontractor, GC, and architect, and it represents a significant portion of project overhead. The goal is to prepare a complete, accurate submittal that can be approved on the first review cycle. Achieving first round approval saves time, reduces administrative costs, and demonstrates professionalism and attention to detail.

Safety and Site Requirements

Most GCs require subcontractors to comply with specific safety and site-access protocols before beginning work. These may include PPE requirements, site orientations, daily sign-ins, equipment certifications, and adherence to the

GC's safety plan. Subcontractors may also be required to submit their own safety documentation, such as hazard assessments or toolbox-talk records.

Compliance with these requirements is essential not only for worker safety but also for maintaining good standing with the GC. Failure to follow site rules can result in work stoppages, fines, or removal from the project. Understanding and meeting all safety and site requirements ensures uninterrupted progress and reinforces the subcontractor's professionalism.

Field Check

Whenever possible, the subcontractor should field measure the job site. When the field check is expected to require more than two hours door-to-door, the cost should be included as a line item in the Bid Estimate. Most GCs require, as part of the subcontract terms, that the subcontractor field measure all openings before ordering materials.

Coordinate and document the planned field check date with the Project Superintendent. For example, if the project schedule shows door installation beginning March 1st and the material lead time is three to four weeks, the field check should occur approximately six weeks prior, around January 15th. The subcontractor should request written confirmation from the Superintendent that the openings will be ready by that date, and follow up around January 7th and again on January 14th to reconfirm readiness.

On the field check date, the subcontractor should bring an extra field copy of the approved submittal, all RFIs, and all coordination documents submitted to date. Upon arrival, the subcontractor should check in with the Superintendent and Project Manager, if available, and ask whether the Superintendent has time to review the openings.

The subcontractor should document the Superintendent approved path that installers

will use to bring materials onto the site and into the building using notes, photos, and/or video. A floor plan or site plan should be used to record this information. The subcontractor should also document the condition of all openings, required clearances, support and backing, obstructions, construction errors, and any other relevant conditions. It is best to record this information directly on the submittal drawings.

Use the RFI process to document all errors, conflicts, or conditions that may prevent or delay installation. If there is any reason materials cannot be ordered, the subcontractor must notify the GC immediately, provide recommended solutions, and formally place the GC on notice regarding potential delays or additional costs.

Support, Backing, and Opening Preparation

Support, backing, and opening preparation often require clarification because many plan details do not include the proper structural reinforcement needed for the specified doors. The subcontractor is responsible for identifying any missing or inadequate support and notifying the GC so the issue can be corrected before installation.

Procurement

Procurement is the process of ordering all materials required for the project and confirming that lead times align with the construction schedule. Once submittals are approved and field conditions are verified, the subcontractor should place material orders immediately to avoid delays. Procurement includes obtaining supplier quotes, issuing purchase orders, confirming ship dates, and tracking deliveries. Clear communication with suppliers is essential, especially when dealing with long-lead items or custom products. Proper procurement planning ensures materials arrive on time, reduces the risk of schedule impacts, and supports accurate billing for stored materials or delivered equipment.

Delivery, Unloading, Storage, and Mobilization

Delivery, unloading, storage, and mobilization must be coordinated closely with the GC, who expects every subcontractor to manage these activities efficiently and without disrupting other trades. It is important to meet with the Project Superintendent early to review site conditions and develop a clear plan for how and when door materials will be delivered and distributed to the appropriate openings. For projects lasting more than a single day, there should be a documented agreement identifying where materials may be offloaded and stored on site. Clear coordination on these points helps prevent damage, loss, and delays, and ensures that installation can begin smoothly once mobilization occurs.

Installation

Installation is the primary phase in which the subcontractor performs the physical work of the project. This includes scheduling crews, coordinating with the GC's Superintendent, and ensuring that all required equipment, tools, and materials are on site. Installation must follow the approved submittals, project specifications, and all applicable safety requirements. Daily communication with the GC helps avoid conflicts with other trades and ensures that work areas are accessible when needed. Proper documentation, such as daily reports, photos, and notes on site conditions, helps protect the subcontractor in the event of delays, damage, or disputes. A well-managed installation phase sets the foundation for a smooth final walk-through and minimal punch-list items.

Daily Communication and Documentation: Effective daily communication is one of the most important responsibilities of a subcontractor's project manager or foreman. This includes confirming work areas with the Superintendent, reporting progress, documenting delays, and recording any directives given on site. All verbal instructions

from the GC should be followed up with written confirmation to prevent misunderstandings. Daily documentation such as photos, notes, and manpower logs provides a clear record of work performed and protects the subcontractor in the event of disputes, back charges, or schedule claims. Consistent communication builds trust with the GC and helps ensure that issues are addressed promptly before they impact the project.

Change Orders

Change Orders are the formal mechanism for modifying the project's scope, cost, or schedule, and they carry the same contractual weight as the original subcontract. While RFIs are used to clarify errors, omissions, and conflicts in the documents, a Change Order is required whenever the resolution of an issue results in added work, deleted work, or a change in materials, quantities, or installation conditions. Because of this, Change Orders protect both the subcontractor and the GC by documenting the reason for the change, the cost impact, and any schedule adjustments.

A Change Order should clearly identify the drawing or specification reference, describe the conditions that differ from the original contract documents, and explain why the change is necessary. It should also include the subcontractor's proposed cost and any associated schedule impacts.

In many cases, the Change Order is the direct result of an RFI response, especially when the architect's direction requires additional materials, labor, or coordination. Once submitted, the GC must review and approve the Change Order before the subcontractor proceeds with the work; performing work without written approval risks nonpayment.

Change Orders are also used when field conditions differ from what was shown in the plans, when other trades create conflicts that require additional work, or when the owner requests upgrades or changes in product selection. Proper documentation ensures

transparency and prevents disputes later in the project. A well-written Change Order demonstrates professionalism, maintains clear communication, and ensures that the subcontractor is compensated fairly for work outside the original scope.

Value Engineering/Reduced Scope Change Orders

Value Engineering and Reduced Scope Change Orders occur when the subcontractor identifies opportunities, usually through the RFI process, to lower the project cost without compromising performance, code compliance, or the owner's operational needs. In these situations, the subcontractor may recommend alternate products, simplified configurations, or reduced quantities that still meet the project requirements but at a lower cost to the GC and owner. When such a recommendation is made, the subcontractor provides a formal quote outlining the proposed savings and any associated impacts. If the GC accepts the proposal, the GC issues a written Change Order documenting the revised scope and adjusted contract value.

These Change Orders serve several purposes: they create a clear record of the cost reduction, they protect the subcontractor by ensuring the revised scope is contractually recognized, and they demonstrate the subcontractor's expertise and commitment to the project's overall success. Value engineering can strengthen relationships with GCs and owners by showing that the subcontractor is actively looking for ways to improve efficiency and reduce unnecessary expense.

Increase to Scope Change Order

An Increase to Scope Change Order is used when the subcontractor is asked to furnish materials or perform labor that goes beyond what was included in the original contract. When this occurs, the GC will typically request a formal written proposal outlining the added cost, any schedule impacts, and the reason the

additional work is required. If the GC accepts the proposal, they will issue a written Change Order documenting the revised scope and adjusted contract value. This written approval is essential, as it ensures the subcontractor is compensated for the additional materials, labor, or complexity before proceeding with the work.

No Cost or Schedule Impact

A No Cost or Schedule Impact Change Order is still a formal modification to the subcontract, even though it does not change the contract value or project timeline. When the scope of work changes, whether in the labor required, the materials to be provided, or the responsibilities assigned, it is essential that these changes be documented in a written Change Order. This protects both the subcontractor and the GC by ensuring that the revised scope is clearly understood, contractually recognized, and traceable later in the project. Documenting these adjustments prevents disputes, eliminates assumptions, and maintains an accurate record of what the subcontractor is obligated to furnish and install.

Price Increases

Price increases should be incorporated into Change Orders whenever the revised scope requires materials that now cost more than they did at the time of the original bid. Any time a Change Order is prepared, the subcontractor must carefully account for current pricing and include all applicable material cost increases in the Change Order estimate. This ensures the subcontractor is fully compensated for real market conditions and prevents absorbing unexpected cost escalations that were not part of the original contract value.

Clear documentation of price increases also helps the GC understand why the Change Order amount differs from the original pricing and provides a defensible record if the owner questions the adjustment. Always retain supplier quotes/pricing as backup support.

Final Walk Through

The final walk through is the GC's initial inspection of the subcontractor's completed work and serves as the basis for creating the project's punch list. This walk-through typically occurs once the subcontractor notifies the Superintendent that installation is substantially complete. During the walk-through, the GC reviews all installed materials, verifies that the work matches the approved submittals, and checks for any deficiencies, adjustments, or incomplete items.

Subcontractors should prepare for the final walk-through by ensuring that all doors, operators, accessories, and controls are fully installed, tested, and operating correctly. Any known issues should be corrected before the GC arrives. A clean, organized work area also creates a strong impression and reduces the likelihood of unnecessary punch-list items. The final walk-through is an important opportunity to demonstrate professionalism and quality. A smooth inspection often results in a shorter punch list, faster close-out, and fewer delays in final payment.

Punch List

The punch list is the GC's formal record of remaining work items that must be completed before the subcontractor's scope can be considered finished. These items typically include minor adjustments, corrections, or incomplete tasks identified during the GC's walkthrough near the end of the project. Although punch-list items are usually small, they carry significant importance because the GC cannot proceed with project close-out and will not release final payment or retainage until every item is resolved.

Subcontractors should respond to punch-list items immediately. Prompt completion demonstrates professionalism, prevents delays in the GC's own close-out process, and protects the subcontractor from extended project costs or backcharges. Each completed

item should be communicated back to the Superintendent so it can be verified and cleared from the list. Keeping a written record of completed punch-list work helps avoid disputes and ensures the subcontractor's work is formally acknowledged as complete.

Close-Out Requirements

Close-out is the final phase of the subcontractor's work and plays a critical role in securing final payment and the release of retainage. Many subcontractors experience unnecessary delays at the end of a project because they overlook or postpone close-out tasks. GCs and owners cannot complete their own close-out process until every subcontractor has submitted the required documents and completed all punch-list work. For this reason, it is essential to begin preparing close-out materials early and to complete all required tasks promptly.

Purpose of Close-Out

Close-out ensures that the GC and owner have everything needed to operate, maintain, and service the installed equipment. It also provides formal confirmation that the subcontractor's work is complete, allowing the GC to process final payment. A complete close-out package protects the subcontractor by documenting compliance with the contract and reducing the risk of disputes after project turnover.

Typical Close-Out Requirements

Most GCs require the following items before final payment can be released:

- O&M Manuals - Operation and maintenance manuals must include product data, wiring diagrams, recommended maintenance procedures, warranty information, and any required safety instructions. Manuals should be organized, accurate, and project specific.

- Warranty Documentation - Provide written warranties as required by the contract, including start dates, coverage terms, and any owner responsibilities. Some GCs require both digital and hardcopy versions.
- As-Built Information - Submit updated drawings or documentation reflecting any changes made during installation, including revised wiring paths, control locations, or equipment substitutions.
- Owner Training - Many projects require the subcontractor to train the owner's personnel on system operation, safety features, and basic troubleshooting. Training should be documented with a sign-in sheet or written confirmation.
- Punch-List Completion - The GC will issue a punch list near the end of the project. All items must be completed promptly, and the subcontractor should request written confirmation once the GC verifies completion.
- Final Lien Waivers and Affidavits - Most GCs require a final conditional lien waiver with the last pay application and an unconditional waiver once payment is received. Some projects also require a final affidavit of payment to suppliers.

Best Practices for Efficient Close-Out

Subcontractors can significantly reduce delays by preparing close-out materials early and maintaining consistent communication with the GC:

- Begin assembling O&M manuals and warranty documents before installation is complete.
- Request the GC's close-out requirements at the start of the project and keep them in the project file.
- Submit draft manuals or documents early for review to avoid last-minute corrections.
- Complete punch-list items immediately and notify the Superintendent when each item is finished.

- Keep digital copies of all close-out documents organized by project for faster preparation on future jobs.
- Confirm with the GC when the close-out package is accepted so final billing can proceed.

Impact on Final Payment

Final payment and retainage are often withheld until the GC certifies that all close-out requirements have been met. Even a single missing document, such as an insurance certificate, warranty sheet, or training sign-off, can delay payment for weeks or months. Completing close-out early ensures the subcontractor is not the reason the GC cannot close the project with the owner, and it positions the subcontractor for faster release of retainage.

Payment

Timely payment is essential to the financial health of every subcontractor, yet the construction industry presents numerous obstacles that routinely delay cash flow. Many subcontractors fail not because they lack work, but because slow payment from GCs creates sustained financial pressure they cannot absorb. Even when GCs pay on time, a subcontractor who significantly increases the amount of new construction work year over year will experience substantial cash flow strain. For every \$1,000 increase in new construction contract volume, approximately \$600 cash flow is tied up during that year, creating a real and immediate financial burden.

Because of these challenges, it is critical for subcontractors to take every reasonable step to ensure timely payment. This includes submitting accurate and complete pay applications, meeting all documentation requirements, complying with lien laws, and proactively communicating with the GC's project management and accounting teams. Strong administrative practices, combined with consistent follow-up, greatly improve the

likelihood of receiving payment when it is due and help protect the subcontractor's financial stability as the business grows.

A practical set of strategies helps subcontractors shorten the time between performing work and receiving payment. These practices focus on accuracy, documentation, communication, and protecting lien rights so the GC has no administrative reason to delay processing.

Strategies to Improve Timely Payment:

- Submit complete and accurate pay applications - Ensure every pay app includes all required backup such as schedules of values, stored material documentation, delivery tickets, and approved Change Orders. Incomplete submissions are the most common cause of delayed payment.
- Align billing with actual progress - Bill only for work that is clearly visible and verifiable on site. When the GC can easily confirm progress, approvals move faster.
- Track and bill Change Orders promptly - Submit pricing quickly, follow up consistently, and include approved Change Orders in the next pay app. Delayed CO billing creates avoidable cash flow gaps.
- Meet all documentation requirements - Provide insurance certificates, safety documents, certified payroll (if applicable), and any other required paperwork before the GC asks for it. Missing documents can hold up the entire payment cycle.
- Confirm the GC's billing schedule - Know the cutoff date, submission date, review period, and expected pay date. Submitting even one day late can push payment into the next cycle.
- Maintain strong communication with GC's project manager and accounting team - A quick email or call to confirm receipt and completeness of the pay app can prevent administrative delays.
- Document stored materials properly - When billing for stored materials, include photos, inventory lists, and storage location details.

GCs often reject stored material billing without clear proof.

- Protect lien rights - Submit preliminary notices, waivers, and releases exactly as required by state law and the GC's contract. Proper lien management keeps payment flowing and prevents disputes.
- Follow up consistently - After submitting a pay app, check in during the GC's review period to confirm there are no questions or corrections needed.
- Avoid performing out-of-scope work without written approval - Work performed without an approved Change Order is at high risk of delayed or denied payment.
- Keep accurate job cost records - When costs are well-documented, disputes are resolved faster and payment is less likely to be held up.
- Build relationships with the GC's field and office teams - Professional, reliable communication often results in faster administrative processing.

Schedule of Values

Most GCs require the subcontractor to prepare a *Schedule of Values (SOV)* before submitting the first pay application. This document is typically included in the contract package provided by the GC. It is best practice to submit the SOV early, even before signing the subcontract, to confirm that the GC will accept the proposed breakdown.

The recommended SOV should include the following allocations, each calculated as a percentage of the *Contract Value (CV)*, less any applicable retention:

10% of CV - Approved Submittals: This amount becomes billable once the submittals receive formal approval.

70% of CV - Field Check, Procurement, Initial Mobilization, and Material Delivery: This portion covers early project activities and major cash flow demands, including field measurements, ordering materials, and delivering them to the site.

15% of CV - Installation: This amount is billed as installation progresses and is verified by the GC's site personnel.

5% of CV - Final Adjustments, Close-Out Documents, and Owner Training: This final portion covers punch-list work, adjustments, O&M manuals, warranty documents, and any required owner training.

Payment Applications

Payment applications should be prepared and submitted as early as the GC's Accounts Payable Department allows - ideally at least 30 days in advance. Each submission should include the pay application itself, current insurance certificates, and all other required subcontract payment documents, combined into one complete PDF to reduce processing delays.

It is essential that all payment applications are submitted before the GC's monthly deadline, which is typically the 20th or 25th. The application should include all work that will be completed by the end of that month, not just work completed at the time of submission. Submitting early, submitting completely, and meeting the cutoff date are key factors in ensuring timely payment.

Common GC billing requirements add another layer of administrative work to the payment application process, and meeting them consistently helps prevent delays. These requirements vary by contractor, but most fall into a predictable set of documentation and verification steps that subcontractors must satisfy before a pay application is processed.

Additional Requirements Commonly Imposed by GCs:

- Notarized pay applications - Many GCs require the pay app, lien waivers, or both to be notarized. Missing notarization is a frequent cause of rejected billing.
- Conditional and unconditional lien waivers - GCs often require a conditional waiver with

the pay app and an unconditional waiver once payment is received. These must match the billing period exactly.

- Updated insurance certificates - Certificates must list the GC and owner as required, include correct project information, and reflect current policy dates. Expired certificates can halt payment entirely.
- Stored-material documentation - When billing for stored materials, GCs typically require photos, inventory lists, delivery tickets, and proof of secure storage. Some require off-site storage agreements.
- Subcontractor progress reports - Some GCs require a brief written summary of work completed during the billing period, especially on larger projects.
- Updated project schedule or manpower reports - A few GCs require subcontractors to submit updated schedules or weekly manpower logs as a condition of billing.
- Approved Change Orders - Change Order work cannot be billed until the GC issues written approval. Verbal approval or “direction to proceed” is not sufficient for billing.
- Compliance documents - Depending on the project, this may include safety plans, certified payroll, daily reports, or other project specific requirements.
- Single, consolidated PDF submission - Many GCs will not process pay apps submitted as multiple attachments. A single, complete PDF reduces administrative friction.

GCs use these documents to protect the project from lien exposure, verify insurance coverage, confirm progress, and ensure compliance with owner and lender requirements. When any required document is missing or incomplete, the GC’s accounting department will typically hold the entire pay application until the issue is corrected.

Submitting complete, accurate, and properly formatted billing packages helps ensure the GC can process payment without delay. Many subcontractors create a standard “billing packet” template, including all recurring

documents, so nothing is overlooked during monthly billing.

Superintendent and Project Manager Support

Support from the Superintendent and Project Manager can significantly improve the speed and success of payment applications. These individuals often have direct influence with the GC’s accounting department, and their endorsement can help ensure your pay applications receive prompt attention. Whenever the Superintendent or Project Manager expresses appreciation for your work, whether they thank you for resolving an issue, praise your responsiveness, or acknowledge the quality of your installation, use that moment to respectfully ask them to share their positive feedback with the Accounts Payable team. Their internal support can help reduce administrative delays and reinforce the value your company brings to the project.

Building these relationships also creates a stronger foundation for future projects, as GCs tend to prioritize subcontractors who communicate well, perform reliably, and maintain professional rapport with field and office personnel.

Payment and Financial Risk Management

Retention and Release of Retainage:

Retention is a standard practice in commercial construction in which the GC withholds a percentage of each pay application, typically 5% to 10%, until the project reaches substantial completion or all close-out requirements are satisfied. While retention protects the GC and owner, it creates a significant cash flow burden for subcontractors, especially on long-duration projects. To avoid delays in the release of retainage, subcontractors should complete punch-list items promptly, submit all close-out documents early, and confirm with the GC what specific conditions must be met before retainage can be billed. Clear communication with the Superintendent and Project Manager

helps ensure that the subcontractor's work is formally acknowledged as complete so the final payment can be processed without unnecessary delay.

Lien Rights and Notice Requirements:

Protecting lien rights is essential to ensuring payment in the construction industry. Most states require subcontractors to send preliminary notices within a specific timeframe after first furnishing labor or materials. Failure to meet these requirements can eliminate the subcontractor's ability to file a lien if payment is delayed. Throughout the project, subcontractors must use the correct conditional and unconditional lien waivers, ensuring that the waiver matches the billing period and payment status. Unconditional waivers should never be submitted before payment is actually received. Maintaining proper lien documentation not only protects the subcontractor's legal rights but also encourages timely payment by the GC and owner.

Stored Materials Billing: Many projects allow subcontractors to bill for materials stored off-site or on-site prior to installation, which can significantly improve cash flow. To bill stored materials, subcontractors must provide clear documentation, including delivery tickets, photos, inventory lists, and proof of secure storage. Some GCs require a storage agreement or additional insurance coverage for off-site materials. Billing stored materials is especially important for door dealers, as materials often represent the largest portion of the contract value and are typically purchased well before installation begins. Proper documentation ensures the GC can verify the materials and process the payment without delay.

Pay-When-Paid and Pay-If-Paid Clauses:

Subcontracts often include payment timing clauses that affect when the subcontractor receives payment. A *pay-when-paid* clause establishes the timing of payment but does not eliminate the GC's obligation to pay; the GC must pay the subcontractor within a reasonable time even if the owner delays payment. A *pay-if-paid* clause, however, shifts the risk of

nonpayment to the subcontractor by making payment contingent on the GC receiving payment from the owner. Subcontractors should carefully review these clauses before signing the subcontract, as they significantly affect financial risk and cash flow planning. Understanding the difference helps subcontractors make informed decisions about project participation and pricing.

Backcharges and Disputed Amounts:

Backcharges occur when the GC claims the subcontractor is responsible for additional costs, such as cleanup, damage, delays, or incomplete work. A valid backcharge must be documented, timely, and supported by evidence. Most contracts require the GC to provide written notice before performing corrective work or issuing a backcharge. Subcontractors should dispute improper or undocumented backcharges immediately and provide their own documentation, including photos, daily reports, and correspondence, to demonstrate compliance with the subcontract. Maintaining accurate records throughout the project is the best defense against unjustified deductions and ensures that payment applications reflect the correct contract value.

Close-Out Requirements Affecting Final Payment:

Final payment is often delayed because subcontractors overlook close-out requirements. These typically include O&M manuals, warranty documents, as-built information, training for the owner's personnel, and completion of all punch-list items. Subcontractors should begin preparing close-out documents early in the project and submit drafts for review before installation is complete. Completing close-out tasks promptly allows the GC to certify the subcontractor's work as complete, which is necessary for the release of retainage and final payment. A proactive approach to close-out reduces administrative delays and strengthens the subcontractor's reputation for professionalism.

Billing for Unapproved Change Orders:

Subcontractors are often directed to proceed with additional work before a Change Order is formally approved. In these situations, it is

critical to document all labor, materials, and equipment on a daily basis using *time-and-material (T&M)* tickets signed by the Superintendent. While some GCs allow subcontractors to bill pending Change Orders on a force-account basis, others require written approval before any billing can occur. Performing extra work without written authorization puts the subcontractor at risk of nonpayment. Clear documentation and consistent follow-up with the GC help ensure that pending Change Orders are approved and included in the next pay application.

GC Payment Cycles and Owner Funding

Cycles: Understanding the GC's internal payment cycle helps subcontractors anticipate when payment will be received. Most GCs bundle subcontractor pay applications and submit them to the owner on a fixed monthly schedule. The owner or lender then reviews the package before releasing funds to the GC, who in turn pays the subcontractors. Delays at any stage - GC review, owner approval, lender funding - can affect payment timing. Subcontractors should confirm the GC's cutoff dates, review periods, and expected pay dates at the start of the project. Knowing the payment cycle allows subcontractors to plan cash flow more accurately and avoid surprises.

Financial Risk Management for Growing

Subcontractors: As subcontractors win more new construction work, cash flow demands increase significantly. Growth requires additional materials, labor, and overhead long before payment is received. Subcontractors should forecast cash flow needs for each project and for the company as a whole, ensuring that adequate working capital is available. Strategies such as front-loaded SOVs, deposits for custom materials, and careful project selection help reduce financial strain. Monitoring backlog, billing cycles, and retention exposure allows subcontractors to grow sustainably without overextending their financial resources.



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