

Restoration Strategy and Marketing for Domination Totally Booked University (TBU) 2 Day Workshop

Day One Agenda

Strategy, Risk Management, Business Modeling and Legal

7 am: Registration, continental breakfast, “meet and greet”

8 am: Welcome, opening remarks by Jeff Cross, introduction of course facilitator

8:15 am: *Building Trust in the “Restoration Triangle”* by: Pete Consigli

Opening Morning Session Overview:

Restoration, remediation and damage repair projects have a unique 3 party relationship whereby the person a restoration company does the work for normally is not paying the bill. Sometimes 3rd party experts are involved or multiple payees might be on the check a restorer must have signed off after the work is completed, which may bring about another set of challenges. Successful restorers must understand this complex dynamic unique to this industry to build customer relationships and grow their business!

This session will cover:

- Restoration Triangle Terminology and Damage Repair Nomenclature
- How to get to a “*Meeting of the Minds*” and establish who your Customer is?
- Damage Repair Project Sequence: 7 stages & 32 sub components of the project
- Unique supervisory and management challenges for keeping good people and meeting customer expectations!
- Purdue University’s Building Construction Management program’s latest research on “*Developing and Maintaining Trust between Contractual Parties for Disaster Restoration and Reconstruction*”
- Use of Best Practices for both the technical and management side of the business of Restoration will keep you ahead of the competition while increasing your bottom line, staying out of court and getting repeat business!

10 am: Break and networking time

10:15 am: “*Insider Secrets, Assignment of Insurance Benefits*” by: Harvey Cohen



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2nd Morning Session Overview:

Are you sick and tired of bidding a job, getting work authorization, doing all the work satisfactorily only to find out the insurance company decides to pay you less than agreed upon, or...even worse, to deny payment altogether? You will learn your rights as a restoration contractor and methods to collect every penny owed to your firm.

This session will cover:

- 1st and 3rd party claims , types of insurance policies and policyholder obligations
- Knowing the difference between Work Authorizations & Contracts or Agreements
- Understanding why an Assignment of Benefits is better than a Direction to Pay!
- Understanding Contractor Licensing requirements and do they apply to your firm!
- Policy limitations, fee shifting and using a Demand Letter for unpaid invoices
- Dealing with Mortgage Companies and other payees on insurance checks/drafts
- Update on the use of industry Standardized Contracts and Forms
- Finding the right local attorney to help you comply with local contractor statues

12 pm: Lunch and Networking Sponsored by Host Location

1pm: *"The Top 10 Challenges of Working with Insurers"*

A Collaborative presentation offering one restorer's perspective and the customer's viewpoint seen through the eyes of an attorney" by: Pete Consigli & Harvey Cohen

1st Afternoon Session Overview:

You have probably heard your parents say, *"You can catch bees better with honey than vinegar!"* This is an old saying that savvy business owners have learned the hard way when having to deal with difficult or major customers who they would like to keep working with, but hit road blocks that lead to confrontation. In the end, taking a hard line might win the battle but lose the war. Pete and Harvey will take you through the challenges you face on the jobsite and how to get to a Win- Win for everyone in the Restoration Triangle!

Business is a battle to get and keep more customers than the competition! This session will explore the most common challenges restores face when dealing with insurers and how to turn vinegar into honey by seeking to find solutions to better serve a common customer, the victim of a disaster or the policyholder. The company whose name is in the upper left hand corner of the check, has plenty of jobs, learn how to get more than the other guy!



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This session will cover: *Facing the challenges by seeking solutions to get paid and make the adjuster and customer happy by:*

- Dealing with Deductibles
- Dealing with Mortgage Companies
- Defining Contractor and Adjuster Roles
- Checking Professional Egos at the Door
- Agreeing on Industry Standards and Resolving Scoping Discrepancies
- Establishing: Why, When, Who and How for 3rd Party Evaluations & Using IEP's
- Vendor Programs: not on them, customer wants you, now what?
- Questioning the Bill after the Fact!
- Multiple Payees on Check/ Insurance Draft: Making sure your name is on there!
- Is it an Estimate or Invoice? Why, "Just saying the "bill" is too high", don't cut it!

3pm: Break and networking time (*You'll get 20 minutes after this intense session!*)

3:20pm: Hey Restoration Contractor! : "Can't get paid, Can't get the check signed, just got served, so what does my insurance policy cover?"

2nd Afternoon Session Overview: Moderated by Jeff Cross

This fast paced hour will be an interactive session moderated by Cleanfax editor Jeff Cross. Consigli and Cohen will address the toughest challenges you face and offer suggestions of how to meet them head on to be more successful in the competitive insurance property restoration marketplace. This will be your opportunity to interact with the instructors in a free flowing question and answer format.

This session will cover:

- Understanding how to advise Customers after a Disaster
- Learn 4 Reasons: *"Why Customers Refuse to Sign the Check!"*
- Decide when to settle, when to sue, or possibly consider arbitration?
- Negotiating strategies for conflict resolution, why compromise can make sense!
- Understanding what your insurance policy should cover and why?
- Receiving a *"Reservations of Rights Letter"* and deciding if to tender a claim?
- Best Practices for the "business side" of Restoration, not just the "technical"!



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4:20pm: “Find a Focus, Position your Company, and Dominate the Market!”

By: Pete Consigli with an Introduction by Jeff Cross

Closing Session Overview:

Many cleaning, construction, janitorial, asbestos abatement and remodeling companies “drift” into Restoration, Remediation and Damage Repair work for a variety of reasons.

They can be in it for a short term gain to “chase” work, or have a long range plan and be well financed with powerful business connections. These reasons range from hard economic times affecting their “core” business, to they simply want to get some of that work that is “recession resistant” and make those high margins they heard all about!

Whatever the reason, in a maturing industry evidenced by ANSI standards, government regulations and well organized national networks if your company does not have a unique market position and a laser like focus to differentiate you from the competition; then the buying decision is usually based on price! The closing session for day one will give you the condensed lessons learned from some of the world’s leading authorities on strategy, positioning and focus, today’s business leaders call them “The Masters”!

This session will cover:

- The Pitfalls of “Chasing the Storm” don’t worry while your competitors take care of your customers!
- 2 basic functions of a business: Do you own a business and run it like one?
- Marketing is the job of leadership, not turned over to “The Marketing Dept.”!
- Why violating the “22 Immutable Laws of Marketing” is at your own risk?
- The 15 Keys to Long Term “Focus”
- Why the new breed of market leaders dominate through discipline?
- “The 11 Laws of Internet Branding”
- Keeping it simple to differentiate or die!

5:10 pm: Closing Comments and Day One Wrap-up

5:15 pm: Day 1 Adjournment: Network and share a meal with a new friend to talk about how you can apply today’s information in your business.

Get ready for another fast paced, day two!



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Day Two Agenda

Marketing, Leadership, Insurance, Execution...Building the Brand!

7 am: Registration, continental breakfast, networking time

7:30 am: Welcome and opening remarks by Jeff Cross

7:45 am: Marketing: “The Least Understood Term in Business?” by: Pete Consigli

Opening Morning Session Overview:

Many business owners’ view marketing as either advertising or selling. Executives with the word marketing in their job titles spend much of their time with advertising or selling. Both activities are important elements of a marketing program, but they are not marketing!

The term “Restoration” has become diluted in the marketplace, how can your company establish a solid book of business split between the insurance and commercial sectors?

Learn why it is important to have a diversified client base and not “drift” into a dangerous situation whereby any one customer or category of clients represents too much of your business!

Marketing is a process with the following steps:

- Understanding a need in the marketplace that a product or service is trying to fill.
- Identifying prospective customers who want the product or service and the qualities that will affect their decision making.
- Determining the numbers, location, and profitability of the potential customers.
- Understanding the competitors who are trying to fill the same need in the market.
- Developing a strategy to differentiate the product or service from the competition.
- Developing a plan to profitably deliver the product or service to the market.



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Develop the Marketing Plan based on available funds and resources to:

“Get it Done”! Don’t proceed with the plan until the company:

Commits to it and will consistently fund and execute the plan!

Part 1 of the opening session will cover:

- ✓ 10 most important marketing secrets
- ✓ Why you should center your marketing on a core concept?
- ✓ Strategies to position or reposition your company or even the competition!
- ✓ 7 Easy steps to developing a “back of the napkin” simple marketing plan
- ✓ Differentiating false image from true identify in your marketing and your brand
- ✓ “The Set-up” for implementing your advertising and sales campaigns
- ✓ Why marketing strategies must be consistent and reinforce company position?
- ✓ Prioritizing marketing activities then only pursue those enhancing strategy!

Part 2 will cover:

- ✓ Defining the term Restoration Contractor
- ✓ How to establish a philosophy to be perceived as “One of the Good Guys”
- ✓ Differentiating customer market segments to create targeted strategies
- ✓ A blueprint for a successful restoration marketing plan
- ✓ Selecting target customers in the commercial and government sectors
- ✓ Targeting the insurance sector and differentiating the various segments
- ✓ Understanding the difference between 1st and 3rd party claims to develop effective marketing strategies and sales tactics to get “the door” opened

9:30 am: Break and networking time

9:45 am: *“Hey Mr. Marketing Guy: How do I effectively use my USP and differentiating ideas in the Social Networking and Internet Age?”* by: Jeff Cross

2nd Morning Session Overview:

What do successful restoration companies and damage repair contractors do with their Facebook and Twitter accounts to get more clients? What does your website need to have in order to get more traffic and land you more restoration jobs?



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Come prepared to take home some fantastic ideas and concepts that you can implement immediately to increase your website presence and company profitability. Learn if and why it may be worth your time to monitor target customer's discussion boards and use timely posts to your advantage? Discover how to create strategic alliances by using links to key sites to increase your website traffic.

With all the experts out there today, learn what questions to ask when hiring a consultant to advise your company on website development or changing and updating content as new information is available. Too often websites take too long to get uploaded and have out of date information! Today's technology doesn't require an outside expert to update content.

This session will cover:

- Targeted Internet marketing techniques
- Using Search Engine Optimization (SEO) to your advantage
- Facebook, Twitter, LinkedIn and timely posts on discussion boards
- Understanding Google, and pay per hit issues to get a ROI
- Using links on your website to strategic alliances and asking for reciprocity
- Working with consultants versus managing your own website

11:30 pm: Closing Morning Session

“What Successful Restoration Companies Do”

Words of Wisdom from Restoration's First Founding Father!

Closing morning session overview:

Martin “Marty” King, CR. ASA is widely recognized to be the restoration industry's 1st founding father. In 1971 he brought 40 fire restoration companies to RIA, then operating under the name of the Association of Interior Décor Specialist. Under Marty's leadership, the National Institute of Fire Restoration (NIFR) was given divisional status to RIA's multi-disciplinary association of the 1970's.

Marty's goal when NIFR was created was to, “Have the business of *Damage Repair* become a profession”. Marty just recently retired after 40 years of service as RIA's technical advisor and has seen his dream and vision for the industry becomes a reality!



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RIA's Industry Advisor Pete Consigli, CR, WLS has considered Marty a long time mentor and teacher of restoration philosophy that has influenced several generations of restorers through creation of the Certified Restorer (CR) program, development of the NIFR Guidelines for Fire and Smoke Damage Repair; and countless articles, restoration marketing and educational literature, seminars and lectures at industry events over the past 4 decades.

Pete will honor this industry pioneer and visionary by closing out the morning session with a presentation of Marty's "jewels" of wisdom, as to what the "master" thinks are the most important things done by, *"Companies that Succeed"*.

11:45 pm: Lunch and Networking Sponsored by Host Location

12:45 pm: "Soft Selling Hardened Claims Adjusters" by: Peter Crosa

1st Afternoon Session Overview:

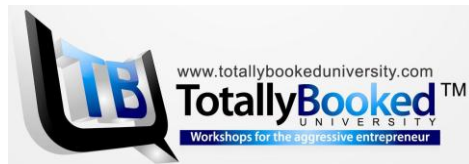
Licensed independent adjuster and private investigator Peter Crosa, AIC, RPA will cover the issues successful restorers need to know when marketing, selling and dealing with insurance adjusters and other segments of that important target industry.

This is where the rubber hits the road when it comes to restoration and damage repair work and the insurance companies. In this session, you will learn what you need to know about adjusters and the most important thing an adjuster needs to know about you.

Where do you find adjusters who will use your services? How do you get their attention? Get ready to learn some techniques to get more insurance work and build that book of business for your company!

This session will cover:

- Insurance industry terminology and claims adjusting nomenclature
- How to distinguish the different type of insurer target groups for effective selling
- Industry specific advertising options for reaching the right people to get work
- Working the associations and trade groups that serve the insurance sector
- Do's and Don'ts of gratuities and vendor appreciation protocols
- Situational Ethics: Establish company policies and maintain your reputation!
- Why it is "no accident" when other restorers in your area get insurance work?



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2:15 pm: Break and networking time

2:30pm: “Hey Hardened Claims Guy & RIA Insider: “What do guys in the ivory white towers really want and what are my options to compete with the big dogs?”

2nd Afternoon Session Overview:

This session is when you will be able to find out what is really on the mind of Crosa and Consigli as they go into an “uncensored and not ready for prime time” mode for 1 hour! How often do you attend a convention, seminar or school and it seems you can never get a straight answer from “the experts” at the podium, on the stage or in the front of the room? This dynamic and interactive hour will have a conversational style that will address the hard hitting issues you need to know about to be successful in the insurance property restoration industry and the business side of damage repair.

This session will cover:

- What do the major insurance companies really want when working with restorers and how can an enterprising restoration company get their business?
- What about restoration vendor programs and service line agreements, can a restorer make a profit on these programs considering the administrative burden?
- Do all these *Codes of Ethics & Conduct* really count and how can compliance and advocating them get me more business anyway?
- Dealing with scoping and pricing issues, does your firm use a pricing guideline?
- How can the little guy compete in an era of restoration networks and national companies as the industry matures and consolidates?
- Why should I belong to an association and travel to a convention, can't I get what I need to know from webinars and local chamber of commerce meetings?

3:30 pm: *Stretch your legs for 5 minutes after that hard hitting session!*

3:35 pm: “Innovating, Leading, Executing and Building a Company to Last”

By: Jeff Cross and Pete Consigli



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Closing Session Overview:

Yesterday the closing message was about creating a focus for your company by developing a unique position in the customer's mind through differentiation and dominating your market with discipline! The restoration industry is maturing, yet in hard economic times there will always be those from "related" industries who try to get work in this "recession resistant" industry by pricing their services below the accepted "going rate". History shows that price is not the primary reason people buy, but rather it is perceived value based on price!

Yesterday's condensed lessons learned from the "business masters" about focus, strategy and branding will only take a company so far if they are unethical, lack creativity, treat their "people" badly or fail to execute. Today's closing session will provide valuable insights learned from years of research about why iconic market leading companies consistently beat the competition and return an investment to their shareholders year after year that beats the market average!

Unless you can apply these lessons to your business successfully, when you want to "get out", your brand might not be worth what you thought it was. Don't spend a lifetime trying to build something and realize all you did was create a job for yourself!

This session will cover: *Detailed Resource document provided for more info.*

- Where do creative ideas come from and how can I build something great?
- Why *Clock Builders* beat *Time Tellers* in the race to the finish line?
- Creating a purpose beyond making money and core values that span the next generation to build your brand and separate you from the competition!
- Why "who" questions always come before "what" questions...
- How come successful companies learn to hire slow and fire fast!
- Using *Win- Win* performance agreements to lead and manage your company
- Creating a Not "to do" list improves execution to get things done, important things trump "feel good" want to do things and avoids "urgent" detours!
- Jewels of wisdom from historic figures like Gandhi and Aristotle on leadership
- Treating your people the way you want them to treat your customers
- Why entrepreneurs "get paid" last, only after they create value for others?
- Educate your staff and customers; create a bond and sense of unity and by helping others you will get everything you want, now and 20 years from now!



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4:25 pm: Closing Comments, Course Evaluation and Day Two Wrap-up

4:30 pm: Course Adjournment: Homework Assignment: Research and analyze the marketplace, differentiate your company, develop a plan, finance the plan, get buy-in for your plan, be consistent, and work the plan.

Travel Safely:

**Create a Focus, Dominate your Market, Build a Brand,
and Get Paid for a Lifetime of Work!**



About Totally Booked University:

Totally Booked University is the brainchild of Cleanfax magazine editor Jeff Cross. TBU workshops are for the serious, aggressive and forward-thinking entrepreneur who *really* wants to find new customers and increase profitability. TBU's Restoration Marketing Workshop is for Restoration Professionals only! If restoration, remediation and damage repair is not one of your primary service sectors, please do not sign up for this event!

Strategic Alliance with Industry Consultant, Advisor and Activist:

Jeff has teamed up with long time cleaning and restoration industry veteran, trainer and the Restoration Industry Association's (RIA) Industry Advisor Pete Consigli, CR, WLS to assemble a team of leading authorities in their areas of expertise. Jeff, Pete and their expert instructors will provide TBU workshop attendees "the edge" they need in today's competitive restoration marketplace to stay ahead of the pack! Restoration is a rapidly maturing sector of the larger cleaning and construction industries and only the most focused and committed companies will get a share of this multi-billion dollar market.

For more information: www.TotallyBookedUniversity.com

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TBU Workshops: All About Building Your Brand!
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