Letter of Expectations

**To: Sales Manager**

**From: General Manager**

**Subject: 20XX Role Description, Expectations and Plan**

20XX is a crucial year for ABC with respect to change, and the importance of your position in the company.

Sales Management is always at the forefront in our company values.

The Sales Management function must be a leading practitioner of “Better Practices” that make the sales department the model for “Sales Excellence” in the market place not just HVAC/Plumbing.

Simultaneously, we have the need as a company to enact changes that are difficult and require both understanding, and behavioral changes.

This position’s compensation, expectations, goals and implementation plan is enclosed.

You have an opportunity to earn well, perhaps better than ever before. It will be based on the performance of the department. You are the leader of the department.

You will be responsible for all Sales Management Functions including the call center.

It will require skills, leadership, and deft communication. It will be a challenge. It will be frustrating at times. It requires change. We believe you are up to this challenge and the right person to lead the changes!

You need to understand the Key Performance Indicators for your department and you need to drive the processes that support these KPI’s aggressively.

The challenge is large and will not be easy, yet it is attainable and can be both gratifying and profitable.

Please review the compensation and the Key Performance Indicators, as well as what the company feels is the critical success factors for 20XX and give us your input.

GM

Sales Manager Expectations:

1. Company Values and Philosophy
2. Adhere to and exemplify the Company’s stated core values and beliefs.
3. Promote the company and the brand wherever possible.
4. Conduct operations of sales department within the framework of the law and the ethics of good business practices.
5. Exercise good judgment in all areas where the company’s interests are represented.
6. Work with a team first, individual second philosophy.
7. Come to work each and every day dressed with a positive mental approach.
8. Leadership Expectations
9. Set the tone for the sales department by living the company core values.
10. Set clear, concise expectations for all department personnel.
11. Provide feedback on a regular basis to all department employees.
12. Keep the sales department neat, clean and organized.
13. Lead the department effort to create a safe learning environment.
14. Develop key personnel in the sales department to prepare them for future opportunity.
15. Implement training and skill development programs as directed by the GM.
16. Produce & track employee performance based on center specific KPI’s.
17. Sales Management Expectations
18. Assure 100% customer satisfaction.
19. Exceed customer’s expectations for quality and value.
20. Handle and resolve all customer complaints within 24 hours, or within Center policies.
21. Insure that the phone is answered within three rings at all times, and by a live person.
22. Return all calls within 24 hours.
23. Communicate with GM on a regular and routine basis to resolve questions, concerns, or issues.
24. Sales Department Performance
25. Meet or exceed all assigned financial goals.
26. Implement all company better practices that apply within the department in a timely manner.
27. Manage the sales department to meet or exceed the company KPI’s.
28. Hire/Identify a successor to the SM role. Provide training and mentor individual to become a SM candidate.
29. Participate in regular center meetings and functions to develop a team.
30. Develop departmental goals that align with center and company goals each year.
31. Gain thorough and complete understanding of how sales department performance impacts the center’s financial and KPI results.
32. Communications, Reporting and Compliance
33. SM will report all relevant information, reports and data to the GM as required.
34. SM will insure department compliance with all local, state, and federal codes.
35. SM will immediately report any relevant issue regarding safety, compliance, or legal directly to the GM.
36. SM will participate in Company meetings, hold regular sales department meetings and participate in company planning.
37. Reviews, Feedback and Personnel
38. SM will conduct performance reviews with all sales department personnel as directed by GM.
39. SM is responsible for providing constant positive coaching and feedback to team members.
40. The SM will work with the GM to define training needs within the department.
41. Skill Development
42. SM will identify areas needing and provide resources to insure proper skill development in the sales department.
43. SM will provide routine and ongoing training (sales, Sales Management, time management, etc.) for all comfort technicians and commercial account managers.
44. SM will work with GM to develop a set of personal development goals.

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Role Description

**Title: Sales Manager – Local Center Operations**

**Reports To: General Manager – Operations**

**Location: Field Operations – Local Center**

**FSLA Status: Exempt**

**Scope of Role:**

The position of Sales Manager reports to the General Manager in the local center.

The role of SM is to plan, direct and control the functions of the sales department, with direction and leadership from the GM. The SM is responsible for leadership, management, and performance in the sales department.

Functional Areas of:

**Accountability**

1. Customer development and satisfaction.
2. Leadership within the sales department. Supporting the company core values and goals.
3. All planning, preparation and execution to meet performance goals of the sales department.
4. The execution of the operational functions in the sales department, primarily the organization, and operations systems.
5. Communication within the department, supporting the company mission, goals, and strategies.
6. Development of an annual marketing plan, sales promotions, and lead generation program.
7. The use of cost effective and approved technology to improve performance within the sales department.
8. To operate the SD within company, local, state, and federal codes.
9. Any other functional responsibility as directed by the General Manager.

**General Responsibilities:**

1. Customer development and satisfaction.
2. Exceeding all customers’ expectations for services provided.
3. Satisfactory solutions to customer needs, concerns, and issues within the guidelines from the GM.
4. Focus on developing long-term customer relationships to insure long-term growth.
5. Implement and improve sales department systems that focus on and enhance Sales Management and profitability.
6. Implement quality control practices as directed by GM; insure Service Dept. performance meets Sales Management KPI’s.
7. Leadership- establishing a vital, healthy and growth oriented work environment.
8. SM must communicate the centers plan within the SD. Employees must understand their role in supporting the company plan.
9. SM must lead by example and manage by continuously training core values established by the GM.
10. SM will establish and hold routine SD meetings to share company goals, results, and performance.
11. SM will create an environment for all employees that are open, honest, team oriented, healthy, and vital.
12. SM will develop his team and identify candidates for promotion within the department.
13. SM is responsible for arranging and providing training (internal and external) to all sales department personnel.
14. Planning and preparation to meet performance criteria.
15. Follow company operating plan developed by GM.
16. In conjunction with GM, develop yearly budget and operating plan.
17. Train all employees on KPI and other performance criteria.
18. SM is responsible for execution of the SD operating plan.
19. Develop and execute SD plan to meet performance goals.
20. Implement and manage based on KPI’s.
21. Implement organizational development program.
22. Develop and implement an operational plan with the GM, which supports total company sales goals, quality processes, and sales systems to meet KPI’s.
23. The SM will direct the daily activities of comfort advisors, lead coordinator, and commercial salesmen insuring proper utilization of all resources.
24. Communications with SD employees in a timely and accurate manner.
25. Conduct performance review and feedback sessions with.
26. SD co-workers as directed by GM.
27. SM to hold regular meetings with SD personnel to update.
28. And facilitate performance knowledge within the department.
29. Communicate routinely with GM regarding SD performance, results, and needs.
30. SM is responsible for training and skill development within the SD.
31. SM will schedule and conduct routine training sessions in the areas of Sales Management, sales skills, time management, company better practices, and any other area as directed by the GM.
32. SM will coordinate additional product knowledge/special programs training through vendor relationships.
33. Conduct interdepartmental training in sales, cross train service technicians in lead generation, accessory sales, etc.

Training Program Sales Manager:

* Comfort Advisor Process Training Workshop
* Leadership Training
* Developing People
* Interviewing Training
* Customer Experience and Peak Relationship
* Personalities, Social Styles Development Training