Letter of Expectations

To: Marketing Manager

From: General Manager

Subject: 2025 Role Description, Expectations and Plan

2025 is a crucial year for ABC with respect to change, and the importance of your position in the company.

Marketing is always at the forefront in our company values, and the development of brand experience as well as client satisfaction.

The Marketing Management function must be a leading practitioner of “Better Practices” that make the company’s brand stand out in the market place not just in HVAC/Plumbing.

Simultaneously, we have the need as a company to enact changes that are demanding 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 and within our company.

You will be responsible for all Marketing Management Functions and brand development.

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 2025 and give us your input.

GM

Marketing Manager Expectations:

1. Company Values and Philosophy
   1. Adhere to and exemplify the Company’s stated core values and beliefs.
   2. Promote the company and the brand wherever possible.
   3. Conduct operations of the marketing department within the framework of the law and the ethics of good business practices.
   4. Exercise good judgment in all areas where the company’s interests are represented.
   5. Work with a team first, individual second philosophy.
   6. Come to work each and every day dressed with a positive mental approach.
2. Leadership Expectations
   1. Set the tone for the marketing department by living the company core values.
   2. Set clear, concise expectations for all department personnel.
   3. Provide feedback on a regular basis to all department employees.
   4. Keep the marketing department neat, clean and organized.
   5. Lead the department effort to create a safe learning environment.
   6. Develop key personnel in the marketing department to prepare them for future opportunity.
   7. Implement training and skill development programs as directed by the GM/Owner/Board.
   8. Produce & track brand, marketing, sales, and team member performance based on specific KPI’s.
3. Marketing Management Expectations
   1. Assure 100% brand experience every time, and 100% complete customer satisfaction.
   2. Develop the company Brand experience platform – what it means
   3. Align all internal, external and operational brand attributes, and brand exposure for consistency. All points of contact see and feel the same brand experience.
   4. Build our company value chain and unique selling proposition by market segment
   5. Develop a yearly marketing plan in alignment with our company business plan and goals.
   6. Align the company external media plan, internal communications plans, and operating processes with our brand experience.
   7. Outline for entire team our company communications plan and be sure they understand it
   8. Develop a lead plan, and solutions to meet lead plan, and tracking systems for all Marketing Expenditures – inclusive of all digital and traditional advertising.
   9. Develop a promotional plan – and campaigns to support each business segments needs to sell to the company sales plans.
   10. Lead the development of marketing evaluations, analysis, and tracking of company marketing performance, and work with any vendors or agencies to accomplish the plan & evaluations.
4. Marketing Department Performance
   1. Meet or exceed all assigned marketing goals.
   2. Implement all company better practices that apply within the department in a timely manner.
   3. Manage the marketing department to meet or exceed the company KPI’s.
   4. Hire/Identify a successor to the MM role. Provide training and mentor individual to become a MM candidate.
   5. Participate in regular company meetings and functions to develop your team.
   6. Develop marketing and sales goals that align with company goals each year.
   7. Gain thorough and complete understanding of how marketing department performance impacts the company financial/KPI results.
5. Communications, Reporting and Compliance
   1. MM will report all relevant information, reports and data to the GM as required.
   2. MM will insure department compliance with all local, state, and federal laws in marketing-advertising.
   3. MM will immediately report any relevant issue regarding safety, compliance, or legal directly to the GM.
   4. MM will participate in Company meetings, hold regular marketing department meetings and participate in company planning
6. Reviews, Feedback and Personnel
   1. MM will conduct performance reviews with all department personnel 3 times a year.
   2. MM is responsible for providing constant positive coaching and feedback to team members.
   3. The MM will work with the GM to define training needs within the department.
7. Skill Development
   1. MM will identify areas needing and provide resources to insure proper skill development in the marketing department.
   2. MM will provide routine and ongoing training (Marketing Management, time management, etc.) for all comfort technicians and commercial account managers.
   3. MM will work with GM to develop a set of personal development goals.

Employee Signature: Manager Signature:

Date: Date:

Role Description

Title: Marketing Manager- Local Company Operations

Reports To: General Manager-Operations

Location: Field Operations- Local Company

FSLA Status: Exempt

Scope of Role:

The position of Marketing Manager reports to the General Manager in the local Company. The role of MM is to plan, direct and control the functions of the marketing department, and directly support the sales department. The MM is responsible for leadership, management, and performance in the sales department.

Functional Areas of

**Accountability:**

1. Brand development and client experience-satisfaction.
2. Leadership within the marketing department. Supporting the company core values and goals.
3. All planning, preparation and execution to meet performance goals of the marketing department.
4. The execution within the marketing department, primarily the development of a plan, lead generation, brand plan, client experience, strategy of brand and media, all Social Media and digital brand strategy, influence on pricing strategy, and overall achievement of KPI’s in marketing plan.
5. Communication within the department, supporting the company mission, goals, and strategies.
6. Development of an annual marketing plan, sales promotions, local marketing events, industry marketing events, shows, conferences, Public Relations, and lead generation program.
7. The use of cost effective and approved technology to improve performance within the marketing department.
8. To operate the marketing department within company, local, state, and federal codes.
9. Any other functional responsibility as directed by the General Manager.

**General Activities and Responsibilities:**

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

Training Program Accounting:

1. Company Culture Training
2. Company Values
3. Company Business Plan - detail
4. Company Budgeting Models and Process
5. Company KPI's and Metrics
6. Development of Accounting Plan
7. Collections Policy
8. Digital Branding Development Workshop
9. Leadership Training
10. Technology Training
11. Interviewing Training
12. Brand & Customer Experience and Peak Relationship
13. Personalities, Social Styles Development Training