HVAC

Letter of Expectations

To: Commercial Account Manager

From: General Manager HVAC Operations

Subject: 2025 Role Description, Training & Incentive Plan

2025 is a year for HVAC to take the next step with respect to change, and the growth of the company.

The position of Account Manager is one of customer relationships and selling.

The position expectations, role description, incentive plan and benefit package are enclosed for review. It will be based on individual performance and you are considered a leader within the company.

You will be responsible for key accounts, development of new accounts, maintenance selling and replacement in our growing commercial installation and service department.

You need to understand the key performance indicators for your position and you need to drive the processes that support these KPI’s aggressively.

The challenge is large yet it can be especially 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.

January 2025

Gary Elekes

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2025 Commercial Account Manager

* Base Salary of $ 40,000 (or whatever you think fits)
* Company Vehicle (transit), or $750 a Month Allowance No Mileage
* Individual bonus plan based on specific objectives as part of company operating plan. Set with General Manager. Based on accounts including maintenance, service and replacement.
* 15% of 1st year Guaranteed contract solutions sales
* 10% of 1st year maintenance sales other maintenance products
* 5% of service calls and replacement sales
* All Commissions to Account Manager paid when company is paid in full
* Standard Company Benefit Program (ours is company pays 80/20)
* The Total Company Employee Profit Sharing Program (See plan)
* Key Performance Measures for Operations Manager Review:
* Total Book of Business – Sales 2025 Target $750,000
* GP$ of $375,000 at target Target 50 %
* Commercial Maintenance Agreement Sales $200,000
* Customer Satisfaction 100%
* Same Day Installation on Commercial Replacements

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Commercial Accounts Manager Job Expectations Detail

Title: Commercial Account Manager Reports To: General Manager

Location: Field Sales FSLA Status: Exempt

1. Company Values and Philosophies
   1. Adhere to the company core values & beliefs
   2. Adhere to the company code of conduct
   3. Promote the company image and brand whenever possible
   4. Conduct your daily sales calls within the framework of the company customer satisfaction standards
   5. Work within the team first and individual second philosophy
   6. Come to work every day with appositive mental approach and attitude to work well.
2. Leadership Expectations
   1. You are a leader, set the tone for the field departments through your approach to your role and your work with each team member.
   2. Work with all company personnel too train and coach where it is appropriate so all employees understand the field operations role.
3. Customer Service & Image Expectations
   1. Achieve 100% customer satisfaction
   2. Achieve a customer experience where a customer is completely happy and satisfied with you, our company and our services. ***Same day service is a key!***
   3. Communicate any issues and concerns regarding customer service immediately.
   4. Handle all customer related issues on site – if necessary draw in others.
   5. Your image is diligently maintained to promote company image.
4. Sales Performance Measures
   1. Develop new accounts to market maintenance, service, and replacement
   2. Develop maintenance agreements and sales through a book of business
   3. Call on all small businesses in the local community
   4. Market the company and generate your own leads (Direct market).
   5. Build lasting relationships and a book of business – target 2 million in 3 years
   6. Work with customer service to create an outbound call process to create appointments to sell maintenance.
      1. Personally track/measure your targets and work to improve your performance
      2. Track your daily calls, your individual customers
   7. Track your sales closure rates, open quotes
   8. Help create a budget, maintain a forecast weekly for your calls and needs, deliver weekly reports to GENERAL MANAGER in weekly meeting
   9. Expense controls at target based on budget and forecast approved by GENERAL MANAGER
5. Communications, Reporting & Compliance
   1. Communicate any issues to supervisor immediately for resolution
   2. Be sure paperwork is properly documented and timely based on policy
   3. Commission reports are turned in and organized based on plan
   4. Prepare a weekly forecast and review with team each week for sales/labor needs
   5. Review and agree to comply with all laws, ethics, and core values of the company
6. Reviews, Feedback and Personnel
   1. Prepare and provide quarterly review session for performance evaluation
   2. Coach and debrief with General Manager
   3. Accept coaching conferences with proper attitude
7. Skill Development by Employee
   1. Develop customer profiles and train service department on customer needs

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

Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Commercial Account Manager Role Description

**Primary Purpose of Position:**

You will be responsible for developing a book of business for commercial maintenance agreements, service, and replacement.

This includes calling on and developing new account relationships as well as improving existing relationships.

Details of Accountability:

1. Company Core Values, Attitude and Teamwork – these are the foundation of what make the company a successful enterprise. All work revolves around the team’s ability to function well as a unit and within the company core values.

* 1. You are responsible for making certain the core values are understood.

1. Customer Relationship Skills and Customer Experiences – these are the backbone of what we do as a company. The customer is our principal concern, and all profits flow from our ability to serve the employee well, so the employee may build relationships with the customer well.
   1. The customer relationship is what a field employee’s primary job truly is. You are responsible for helping create and foster courteous, professional behavior using sales practices.
   2. Customer happiness, and satisfaction are mandatory based on personal relationships with our customers and a field employee will conduct themselves with the utmost professionalism at all times.
   3. Cleanliness, neatness as a person and vehicle for image will be maintained based on the company policy based on your set standards, and the company standard.
   4. Development of pricing, and marketing materials to support lead creation from field opportunities to secure new service, replacement and maintenance agreements.
   5. Execute any change orders and billings.

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1. Selling competency and Aptitude – the positions value is executing customer relationship skills and basic technical competency.
   1. The role is about selling by building relationships and trust.
   2. Sales Training and relationship skills are critical for your position.
   3. Attend any suggested vendor training for technical or product upgrades
   4. Understand how to evaluate equipment, the replacement cycle, and basic maintenance evaluations on site and on buildings.
   5. The position requires ability to be on and off ladders/roofs etc…
   6. Position requires ability to use a laptop and software (pricing software)
   7. Call schedules (75 calls -10 building visits -3 presentations -1 sale weekly)

1. Image – our vehicles represent our company brand to the outside world and we value our company brand. Brand equals trust so we will maintain a high standard of image when it comes to our fleet.
   1. Vehicles are to be kept clean inside and outside at all times, washed when necessary to maintain clean visual image
   2. Maintain company personal image – your appearance in a manner consistent with our company policy.
2. Administrative tasks - paperwork completion, technology, and information for the company are essential to operate well-run departments in the field. You are expected to insure completion of all necessary paperwork as requested, with a proper attitude. The administration tasks such as inventory count sheets, material requisitions, payroll tickets, and material recovery forms need to be timely, legibly and accurately completed. Your warehouse function must control all the same tasks properly.
   1. Complete all required paperwork per the established daily standards.
3. Training and Skill Development- training is an important part of employee development. All areas of training are important to a field employee that is well organized, technically capable and customer oriented. It is expected a field employee reporting to you will solicit training on their own beyond the company sponsored training.
   1. Computer proficiency is a must in this role – training as required by plan.
   2. Sales and relationship skills
   3. Completion of company training programs for technical competency
   4. To have a personal skill development plan as directed by GENERAL MANAGER.

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

Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Training Plan for Commercial Account Manager

Company Core Values

Sales Training for Commercial Maintenance Agreements

Software and use of tools for pricing – as needed

Communication Skills

Company Operational Software Usage

Vendor Products Classes

EXCEL, WORD – minimum intermediate usage