Human Resources

Hiring a Sales Professional for Home Selling

*Hiring a Comfort Advisor can be a key growth strategy for your*

*business. Whether you are considering hiring your first*

*Comfort Advisor or are adding additional positions, choosing the right person for the job is critical for success.*

Every business depends on the sale of products and services for revenue. Heating, Air Conditioning and Plumbing companies are no different.

In terms of selling products, there are several choices as to who performs this function. Depending on the size of the business, the selling function may be performed by:

1. Owners/Managers
2. Technicians
3. Professional Sales People
4. A combination of all three.

This article addresses the **sales position**, which is also referred to as the “**Comfort Advisor**”.

A Comfort Advisor is a professional sales person that provides customers with home comfort solutions. A Comfort Advisor **is not an estimator who sells on “price’ alone**. In contrast, a Comfort Advisor provides **options and solutions** that address customer benefits beyond price.

* This is called “value-added” selling.
* Also known as Value = Price/Benefits.

A good Comfort Advisor will produce over $1.8 million in sales per year at excellent gross margins. Many sell over $2.0 million.

*High performing Comfort Advisors generate revenue and gross profit dollars that drive net profit.*

A high performing Comfort Advisor will use their magnetism, style, charisma, and personal likeability to get people to buy from them. In addition, a successful Comfort Advisor is disciplined in his/her execution of the sales process as endorsed by the company.

The company benefits of employing a Comfort Advisors are obvious. However, if you hire an incompetent Comfort Advisor, revenue will decline and profits will suffer. **Hiring the right person** for the position is imperative for the success of the company and the individual.

In the course of my career, I’ve hired and trained over 150 Comfort Advisors. As you look into hiring a Comfort Advisor, the following information contains insights for you to consider.

A Comfort Advisor is NOTa Magic Bullet

You as the owner or general manager are the leader and must align the sales role with a budget.

It’s easy to get caught up in the thought that a Comfort Advisor will solve many of your problems. They certainly can increase revenue, but they will also likely increase your marketing cost as well.

Many owners think that once they hire a Comfort Advisor they do not have to worry about revenue and their problems are solved. Quite the contrary, this is where as an owner your work changes into more of a leadership role **(See leadership materials in the site)**.

A Comfort Advisor is excellent **sales strategy** when used properly. However, success still rests with the ability of the Owner/General Manager to lead and manage the sales organization, as well as the company.

Blocking and Tackling

Before hiring a Comfort Advisor, make sure you take care of the blocking and tackling needed for the position. It means:

1. Having a sales process the company endorses.

**Review all of these materials on the web site under sales and sales management.**

1. Having sales collateral materials to support the sales process.
2. Having financing options available to support the sales process.
3. Having sales and support systems in place.
4. Having a compensation plan that is aligned correctly.

Sales Process

In- home retail selling is not easy.

It takes a talented Comfort Advisor to close in this environment. It requires a structured sales process to earn the right to close with our customers.

For example, the Comfort Advisors at Service Champions Advisors typically spend a minimum of 90 minutes on each sales call to complete the sales process our company endorses. At Air Solutions the sales process takes approximately 2 hours. In both cases the goal is a higher average sale, a higher closing ratio, and a happier customer in the end. If you have not defined a sales process, create one. Refer to related articles on this subject on the web site.

Endorsing a sales process is the first step. Making sure that the Comfort Advisors are trained and remain disciplined to the sales process is quite another thing.

Processes tend to break down when not monitored and managed. Be sure to constantly reinforce the selling process at your company. Do this at sales meetings or when riding along with the Comfort Advisor on sales calls.

Sales Collateral Materials

Once you’ve defined the sales process, the next step is to create a Company Credibility Book.

The Comfort Advisor uses this tool in the sales presentation to explain options and to show the customer the benefits of purchasing from your company. The Credibility book also contains price sheets if you do cookbook pricing. (The credibility book is on the site electronically).

A Presentation Folder or IPAD E system is also recommended. The folder holds all the paperwork left with the customer after the sales presentation. A professional looking folder enhances your company’s image.

I also recommend a Company Brochure. The brochure is left behind after the sales presentation and serves two purposes. If the customer has made a purchase, the brochure helps reinforce that decision. If the customer has not made a purchase, the brochure highlights the reasons why the customer should consider your company in their final decision.

Effective **Sales Paperwork** is essential. This includes:

* Investment Agreement. This is the contract that identifies the elements of a closed sale.
* Proposal. In cases where the customer does not make the purchase at the time of the sales presentation, this form outlines the details of the proposed sale. I recommend using a Customer System Recommendation worksheet as the proposal. The Customer System Recommendation should include an Operating Cost Comparison Sheet to estimate the energy savings available with various equipment options.
* A Work Order or Task Sheet outlines the details of the sale to the installation department.
* Load Calculation worksheet.
* A Home Comfort Analysis. This form collects technical information about the existing installation. I also recommend incorporating a customer survey analysis that can be used in the sales process.
* Comfort Advisor’s Fee-For-Service Schedule. The Comfort Advisor uses this form to identify the commissions earned on a sale. The form is routed to the Sales Manager.
* Finance paperwork.
* We also use/include a Consumer Education Booklet.

(all of these can be found on the site in the sales collateral materials section)

Sales Support Systems

Hiring a Comfort Advisor is a major commitment that impacts your company’s success or failure. You need a system to measure and monitor Comfort Advisor performance. The metrics must include:

* Revenue
* Average Sale
* Closure Rate
* Gross Margin Dollars

I recommend basing closure rates on all leads a Comfort Advisor goes out to visit! In our case we do not let Comfort Advisors set their own leads. This is done through a Lead Coordination function. You want to be in complete control of all incoming sales leads and the Comfort Advisor’s schedule.

Financing Options

Having “MULTIPLE” financing options available to customers is an essential tool for any sales organization, but particularly important for HVAC in-home sales.

Financing Options offer a viable solution to customers who face the unexpected expense of having to replace HVAC equipment. Many consumers also prefer financing to use other people’s money and to enhance cash flow.

A well-run sales organization should expect to finance 40% to 70% of all jobs.

EGIA has several options, and many high-risk options also exist. It needs to be offered early, presale, in sales several times, be costed as a monthly investment as the presentation versus the total investment, and become a cultural part of the selling process.

Comfort Advisor Compensation

Before hiring a Comfort Advisor, be sure to have a compensation plan that is aligned correctly. When compensation is aligned, both the company and the Comfort Advisor come out winners. Be sure to have a document that specifies the terms of the position. Some people refer to this document as the sales contract. I prefer to call it a **Sales Plan**.

There are many types of Comfort Advisor compensation plans available.

Some companies prefer to have their sales people act as project managers. The C/A job responsibilities and duties include engineering the job, making a detail list of equipment and materials needed for the job and pricing the job to obtain a desirable gross margin percentage. For such a sales process, paying the sales person a sliding commission scale based on the gross margin is very popular.

I prefer not doing engineered work, but would rather concentrate on residential replacement jobs. From a business standpoint, this allows a company to maximize gross profit dollars per crew day. **This tends to increase our overall profits, and our ability to reward our key employees!**

Replacement jobs tend to be easily replicated. Consequently, we recommend that pricing be controlled of management through the use of cookbook pricing.

The price book easily identifies the equipment options available and also identifies all accessories and any defined additional tasks that must be performed in the installation. Refer to related articles on **Cookbook Pricing** on the EPL site.

If you believe in paying a Comfort Advisor straight commission, either a small salary and commission or straight, you need a model that supports your company goals.

Of course, for a new Comfort Advisor, you want to invest in that individual’s future success. We pay a weekly salary for the first 3 weeks.

A sliding commission rate based on either top line sales or gross profit dollars is the most common, and this enhances the type/quality of system sold. For example, the commission rate is as a top line paid on sales:

|  |  |
| --- | --- |
| **Basic System** | **Deluxe System** |
| 6% of the entire job | 8% of the entire job |
|  |  |
| **Premium System** | **Supreme System** |
| 10% of the entire job | 12% of the entire job |

We have two different sales pay plans at our company. We have a standard Comfort Advisor Sales Pay Plan and then a Senior Comfort Advisor Sales Plan.

The Senior Advisor plan is for those that have produced $1.8 million in sales for a minimum of 2 years with our company. This plan rewards the Comfort Advisor for this performance by bumping up the commission percentage one point or several if you pay on Gross Profit Dollars.

Some additional compensation issues to consider in the sales plan include:

* Sharing commissions with technician set leads.
* Adjusting commission rates to accommodate discounting the price or including value-added accessories in the sale.
* Adjusting commission rates for special financing options or seasonal promotions.
* Adjusting commission rates for pricing errors or omissions.
* Adjusting commission compensation for missing paperwork.
* Adjusting commission rates up for self-generated leads.
* Establishing a quarterly and yearly bonus program to reward excellent performance.

The Sales Plan document addresses issues such as commission rates, sales quota expectations, car allowances, cell phone policy, job duties, etc. The next page addresses components of a Comfort Advisor Sales Plan.

The Sales Plan should be for a specified period. We update our Sales Plan yearly. The Sales plan should contain provisions for both the Comfort Advisor and for Sales Management signatures. A copy of the agreement should be placed in the Comfort Advisors personnel file.

See the Web site for a sample Sales Plans both GP$ and Sales.



**To effectively align Comfort Advisor compensation to company goals:**

* **Incorporate commissions into pricing methodology.**
* **Outline all compensation issues in detail in the Sales Plan.**
* **Identify all job responsibilities and duties in detail in the Sales Plan.**
* **Include provisions to adjust commissions for undesirable behavior such as discounting, missing paperwork, etc.**
* **Have an installation system in place to identify anything missed in the sale.**

Comfort Advisor Sales Plan Components

**Terms of commission payment – Job completed and paid for. Outline the**

**“Fee-For-Service” (commission schedule).**

* Recommend commission based on type of system sold.
* Recommend provision for technician set sales leads.
* Special promotions and impact on “Fee-For Service.”

**Outline company policies for discounting – If applicable.**

* Use of Cash discounts.
* Use of discounts with Service Agreement customers.
* Flexibility of Comfort Advisor to discount.
* Impact on “Fee-For-Service” when discounting.
* Guidelines to negotiate value added elements to the sale instead of

discounting price.

* Details of spiffs when jobs are not discounting.

**Self-generated lead expectations.**

* Recommend 1 self-generated lead for every 2 provided by Company.
* Impact on “Fee-For-Service.”

**Policy for pricing errors and omissions.**

* Impact on “Fee-For-Service.”

**Performance Expectations**

* Monthly revenue expectation.
* Minimum closure rate expectation.

**See Examples of a Sales Plan on this website**

**Job responsibilities:**

* Description of duties.
* Identify paperwork requirements.
* Impact on “Fee-For-Service” when paperwork is not completed correctly.

**Details of bonus programs such as:**

* Special spiff programs or sales contests.
* Bonus Structures. Recommend:
  + Quarterly bonus program.
  + Yearly bonus program.
* Vacation incentive program.

**Other aspects covered:**

* Cell phone expense.
* Car allowance.
* Fuel allowance.

**Place for signatures**

**See Examples of a Sales Plan on this website**

Define Skill Sets Needed of a Comfort Advisor

**As you prepare to interview for a Comfort Advisor position, it’s always a good idea to review the skill set requirements. Consider:**

1. **Ability to Ask Questions**

The questioning skills a sales person develops very often makes or breaks the ability to make people trust you, and know you understand their needs.

1. **Ability to listen and keep your mouth shut and brain from over-working while listening!**

Listening, and really hearing the genuine desires, wants, and needs of the customer is a skill that virtually all-sales personnel can improve.

1. **Ability to relate to people and make people like you – Connection.**

The skill of relating to and connecting with people is a must. People buy from people they like and trust, and the only way they are going to like you is if you have the skills to make yourself more like them.

1. **Ability to recognize situations and solve people related problems.**

Solving problems is about making the correct assessment, and making good decisions. Having the skill to determine the issues; needs and recognizing the opportunity is how top performing sales personnel sell products and services others never seem to be aware of?

1. **Ability to risk fear of failure and ask for the business – And not be ashamed of asking for the order!**

Asking for the order is a skill. There are many sales people who are excellent presenters, have fantastic communication skills yet struggle to ask for the order. If you don’t ask, you won’t get!

1. **Skill to adapt your personality.**

Adapting your personality to mirror the customer is a skill that creates likeability.

1. **Ability to communicate.**

Written and oral communication skills allow people to get to know you, and they make assessments about you based on several factors, one of which is how well you can communicate your ideas.

When Should You Hire A Comfort Advisor?

**Hiring Your First Comfort Advisor**

The first consideration for this question is if you already have a Comfort Advisor on staff. If you do not already have a Comfort Advisor you probably rely on management or selling technicians to perform the equipment sales function.

If management is doing the selling, consider the following issues as you explore the option to hire a Comfort Advisor:

* **Generally when a company reaches between $1 million in annual revenue**, it’s time to consider using Selling Technicians or hiring a Comfort Advisor. Below $1 million in sales, most companies rely on management to do sales. Eventually the company hits a revenue plateau somewhere around $1 million to $1.5 million. There just is not enough time in the day for a manager/owner to make the sales calls to grow revenue beyond this plateau.
* **A Comfort Advisor should generate a minimum of $600,000 per year.** We set the benchmark at $1 million at my company. Begin by asking yourself if you have the production capacity to support the additional sales. Also consider your Working Capital requirements for the additional revenue. Generally Working Capital requirements should be about 10% of sales. A lack of Working Capital can cause cash flow problems and financial stress.
* **Do you have a marketing plan that supports the sales leads requirements?** An effective sales process generally requires about 90-120 minutes or more per sales call. We schedule sales appointments in 3-hour windows. Consequently, I feel that a Comfort Advisor should only run 3 leads per day; perhaps 4 at tops when it is very busy. If the company does not provide sufficient leads, it will cause problems with the Comfort Advisor. A good marketing plan identifies where and when leads are coming from to meet the company’s sales goals. As I mentioned earlier in this article, also be prepared to increase your company’s marketing expense. This does not imply that the company should provide all sales leads. It’s very important that a Comfort Advisor build a

referral base among customers. I recommend that a Comfort Advisor be expected to generate one lead for every two provided by the company.

* **Recognize that your prices need to increase to accommodate the Comfort Advisor compensation** and any additional marketing expense. This means your company must take a value-added sales strategy and may be selling at a higher price than a competitor with a lower overhead structure. Ask yourself a few tough questions.
* Do you do better work than the competition?
* Does your company’s image project a value-added position?
* Can you differentiate your company from the competition?
* Can you sell your company benefits rather than dealing on price alone?
* **Do you have the sales support needed for a sales organization?** Someone at the company needs to perform the Lead Coordinator function. The Lead Coordinator schedules all sales appointments with the customer and then gives the leads to the Comfort Advisor. It’s estimated that sales leads can be as much as $300 apiece. You want to have absolute control of all sales leads so the Comfort Advisor does not burn leads. This does not mean that you need to hire someone special to be a Lead Coordinator. It does mean someone in your office needs to perform that function.
* **Are you prepared to manage a Comfort Advisor?** Comfort Advisors are generally very high maintenance. You personally need to monitor and constantly reinforce the sales process your company endorses. Otherwise, it will breakdown and the Comfort Advisor may want to go to the lowest denominator – price. A good Comfort Advisor will get rejected as much or more than when he/she makes a sale. One of the primary responsibilities of a Sales Manager is to keep the Comfort Advisor motivated.

(See the web site for the sales coaching system and materials).

**Using Selling Technicians has its advantages and disadvantages. When considering hiring a Comfort Advisor in conjunction with Selling Technicians or in lieu of Selling Technicians, consider:**

* **Consumers generally trust technician recommendations,** particularly when dealing with issues such as bad heat exchangers or dead compressors. However, most technicians fall short when presenting comfort options on working equipment. Consequently, all Selling Technicians should be trained on the selling process endorsed by your company.
* **Considering the preceding bullet, Selling Technicians tend to sell replacement** units rather than replacing systems. If you have Selling Technicians, be sure to monitor the average sales closely. Many successful companies encourage technicians to turn in sales leads to the sales organization rather than trying to make the sale directly. The technician should be rewarded for all leads that are set from within the customer’s home. I recommend giving the technician a portion of the Comfort Advisor’s commission rate for all tech set leads. We give the tech 2% for all leads that sell.
* Considering the preceding bullets, **Selling Technicians sometimes have difficulty selling equipment options other than ‘Basic’ or ‘Deluxe.”** Some companies will not let their Selling Technician sell ‘Basic’ equipment. In any case, you need to monitor and manage the mix of equipment sold by Selling Technicians.
* **If you do have Selling Technicians, I recommend creating a Selling Technician Sales Plan.** This is very similar to the Comfort Advisor Sales Plan. The plan outlines the compensation and job responsibilities in regards to selling equipment. I recommend that the commission rates be lower than for the Comfort Advisor.
* **When hiring a Comfort Advisor in conjunction with Selling Technicians, be sure to mold a sales team.** For example, I recommend Selling Technicians attend all sales meetings with Comfort Advisors.

**Hiring Additional Comfort Advisors**

As your company grows, you’ll need to hire additional Comfort Advisors from time to time. You should look at a couple of things as to when it’s time to hire another Comfort Advisor. When I see a Comfort Advisor is consistently running 3 or more appointments per day, I know the closing ratio is going to drop. The Comfort Advisor loses the sense of emergency and begins thinking, if I do not close this one, I’ll just move on to the next one. The Comfort Advisor does not spend enough time on each sales appointment to earn the right for the sale. Consequently, I monitor both the appointments per day as well as the closure rate.

While I’m speaking of closure rates, I like to see a **minimum closure rate of 45% of** all leads dispatched by the Lead Coordinator. This will seasonally change and should average at 60% for the year when blended with peak season and slow shoulder seasons (See SALES TRAINING).

When I have a Comfort Advisor running more than 3 leads per day, I instantly see closing ratios drop down to below 40%. If we can limit the calls to one to two or sometimes 3 calls per day, the closing ratio will get back to 45-60%. They feel they can focus on quality and relationships instead of hurrying through the process due to the pressure of the next call.

Closure rate is impacted by the types of leads and by the pricing strategy you employ. The mix of leads is desired at 25% marketed and about 50% technician turnovers or service, and 25% referrals.

When it is time to hire another Comfort Advisor, be sure to keep you other Comfort Advisors in the loop. The other Comfort Advisors will be concerned that they have enough leads. Let them see the big picture of where the company is going and that you have a marketing plan in place to generate sufficient leads for all the Comfort Advisors. I also recommend setting up a sales lead scheduling priority. Comfort Advisors with the best closing ratios, get the most sales appointments.

Recruiting

We have a Comfort Advisor ad in the paper ever day of the year. We receive resumes all of the time. My Comfort Advisors know this. It keeps them sharp and on their game at all times. Our Comfort Advisors never get too comfortable. I’m interested in building character and making them better people because of the effort they put forth in their sales efforts.

You can look set up LinkedIn, the paper or Internet sites to promote the opportunity. It’s just a 3 or 4 line ad where we ask if they are making $125K to $150K minimums per year. We also mention the company generates leads.

By constantly advertising for Comfort Advisors, it puts the company in a position to get that superstar who may look at the paper once a year. This is in contrast to other companies that only put a huge ad in the paper only when they need a Comfort Advisor. They count on a high-performer sales person looking at the paper in during this small window of time.

Initial Screening

Our Client Care Representatives are trained to respond to any phone inquiry about the Comfort Advisor position. We prefer to call our phone caretakers Client Care Representative rather than Customer Service Representative.

We’ve developed a simple questionnaire for our CCRs to get basic background information. This includes name, city and telephone number. Then we ask the prospect very specific questions such as:

* What type of in-home sales experience do they have?
* What are the last 3 companies you worked for?
* Do you/your family members have problems with work hours in evenings or Saturdays?

The above questions will dispel some candidates fairly quickly. The primary thing to look for at this point is if they have in-home sales experience. In-home experience tends to be better than NOT in-home experience. For example, cellular phone sales people are fundamentally order takers. In-home sales guys have to be closers.

A Comfort Advisor has to be able to make something happen. In-home sales is a completely different ballgame. You will also get an occasional candidate that has copier sales experience. This is fairly aggressive sales experience where we’ve had success.

Since much of the sales appointments are going to be scheduled for times convenient for the customer, evening work and weekend work is mandatory. It’s good that the candidates know this right up front.

You will notice that the CCRs do not ask about HVAC sales experience. We do not care if they have HVAC experience. I actually prefer they do not. Many HVAC sales people have picked up bad habits. I can take someone with good in-home selling skills and provide him/her with the technical training to perform the Comfort Advisor duties.

The CCRs will pass on the questionnaires on to my desk. I’ll sift through them and when I get 15, I’ll narrow down to 7 or 8. I’ll then give these names to my assistant with instructions to phone these people to schedule a group interview.

Group Interview

This is a practice I picked up from Southwest Airlines. Service Experts when it was independently a public company also used this practice effectively.

A group interview saves time and lets you see how candidates respond among their peers. A group interview lasts about 1-2 hours.

It is amazing how much more you can read from watching body language versus talking over the phone. We have all the candidates come to the office at the designated time. We like to have one of my key managers attend the interview as well. Sometimes we get so involved with the interview process that we may miss things.

Another set of eyes looking at the body language and critiquing the interviewees to be very helpful.

We’ll have 7 or 8 candidates show up for the interview. My assistant will direct them to the meeting room. At the assigned time, my assistant hand out application forms to the group. We’ll enter the room a couple of minutes later.

The candidates usually start filling out the application immediately. When we enter the room, we tell them they will have lots of time to fill out the application but that we would like them to set it aside for now. We then tell them that-

**“The group interview is an idea we got from Southwest Airlines. Look around the room and you’ll see that there are 8 of you. Let’s figure that interviewing each of you would take an hour to an hour and a half. With 8 people that are possible 12 to 16 hours of time that myself or my managers would have to spend. We have followed Southwest and started these group interviews. This group interview allows you to find out about us to see what we are all about. It also allows us to find out a little about you and give us an opportunity to see you as well.”**

We then go to the board and list a set of instructions.

**“OK folks this is what we want you to do and when you are done, we’ll do it. You will each have 2 or 3 minutes to share your name, your experience, your hobbies and something unique about yourself that you want to share with us.”**

Each candidate introduces himself as we go around the room. We are able to see how competent each one is as they speak to the group. We can see how well they articulate. Most important, we see how well they follow instructions. Some of the candidates will continue to fill out the application once they have completed their presentation and do not listen to anyone else in the room. They have no interest for anyone else in the room.

Once all the candidates have completed their presentations, we then go into a 15 to 20 minute dialog about our organization, our core values and our company philosophy. We tell them a little bit about the job and what it entails. We then tell them to fill out the rest of their application they were filling out before we came into the room and that we would be meeting with each one individually for 2 or 3 minutes. We end up by saying:

**“We will be calling those of you we chose to have second interviews in the next 48 hours. We are not going to be calling those of you who we do not choose. So, if you hear from us within the next 48 hours, terrific and we will have a second interview. If you do not hear from us, it did not work out this time. Do not get discouraged. We’ve had someone that did not get picked the first time. They came in a second time and we ended up hiring that person.”**

As we meet with each candidate individually, the first question we ask is “tell me what your interest level is and what you thought about today”. By this time we can tell if we like this person. We comb through the application while we are talking to them. We can see how they communicate one on one. It also gives us a chance to ask a few questions about their experience.

We then write an ‘A’, ‘B’ or ‘C’ on a piece of paper and affix it to the application.

Never WRITE ANYTHING DIRECTLY ON THE APPLICATION! It is a legal document and will be very much a part of any legal proceeding. Make your notes separately.

An ‘A’ is for sure and we will call them back for a second interview. The grade of ‘B’ is a maybe if there are not a lot of good candidates. A ‘C’ is no way. For those we like, we tell them they stood out in the group. They feel pretty good about themselves because they were selected over the other people that came to this interview.

Second Interview

After the group interview, we will compare notes with all in the room. We will decide which candidates we want to come in for the second interview. My assistant calls the candidate(s) to schedule the interview. We also ask them to bring in any sales awards they’ve won in the past.

**Comfort Advisor Profile**

We look for people with a competitive background. Have they done something competitive like sports or something for them to get out of their comfort zone where they’ve had successes and have had failures in a team environment? We try to keep things very simple. Would I buy from this person? Would I like them in my mother’s home?

We also look for people with a winning track record and who have made a lot of money at in-home sales in their past. We do not like to go after people who only make $30K or $40K per year because they are used to mediocrity. We like to go for guys who have made an $80,000 Plus because they are used to making that kind of money.

**Interviewing Process**

The second interview lasts about 1-1/2 to 2 hours. We begin the second interview by going through their previous employment. We ask them:

* How did you get your leads?
* Do they understand what in-home sales means?
* Do they understand you have to go out and make it happen – By yourself?
* What sort of success have they had in the past?
* What awards have they received?

The candidate then talks about the sales awards they have brought to the interview. We review the Comfort Advisor Sales Plan with them.

We go over:

* Company Culture
* Core Values
* Compensation
* All job responsibilities.
* Job expectations and the Metrics
* Training

After the candidate interviews with me, they next interview one of my key managers. The key manager structures the interview pretty much as above. We will compare notes later.

We also like the candidate to go to lunch with one of my top Comfort Advisors and a manager.

The Comfort Advisor will be straight up honest with the candidate about the job. You run risks in doing this. Be careful with the agenda of your sales people, that is why we also send a manager, where the lunch is all about the Comfort Advisor sharing, and as the safety net we have a manager there as well.

They may discourage the person coming on board because he/she is worried about not getting enough leads. Be very clear with your sales person that you are going to fill their schedule first prior to giving leads to the new sales person.

We generally decide on a candidate to fill the position.

Background Checks

We will call previous employers and ask:

* Would you rehire them?
* What is the reason they left?
* What type of income did they make?
* Did they show up on time?

We also conduct the usual background checks including:

* Substance Abuse testing.
* Criminal background check.
* DMV check.
* Social security trace.

After passing all the background checks, we have the person come to the office and again and extend an invitation to join our sales team. The new Comfort Advisor signs the Sales Plan. We then go over the details of the training plan.

Final Advice

For those of you hiring your first Comfort Advisor be prepared to go through a few under-achievers before you find a good one.

Be prepared to pull the plug should the Comfort Advisor not produce. After 3 months, if a Comfort Advisor is not closing 40%, he’s not going to be around. We start having these conversations after month two.

If the person is right under 40%, we will work with them. They have to be closing 40% or more. That’s our Comfort Advisor performance standards. There will be times when you get so excited about a person that you may not want to pull the cord because you want him/her to work out. Remember to always maintain the performance standards for the job.

The best advice I can give is to have weekly sales meetings where the Comfort Advisors have to present their numbers from the previous week to the rest of the group. This is what I refer to as the peer accountability process. They tell:

* How many leads they ran for the week.
* How many they sold.
* How many leads they have run for the month to date.
* How many they sold month to date.
* Total installed dollars.
* Where they are to their plan?

Why is this Critical to Your Success?

* Having the right process in place to hire a Comfort Advisor.
* Allows you to create a compensation plan that drives performance.
* Allows you to profile the position to identify candidates with the necessary skills for the in-home sales environment.
* Allows you to continually be on the lookout for talented people as you recruit for the position.
* Allows you to interview in a group setting to save time.
* Will grow your business. A productive Comfort Advisor can generate $1 million or more in revenue each year.