iv. *Sales Representative – Window Works*

JOB DESCRIPTION

Direct Supervisor	LuAnn Nigara	Date	5/11/2020
Location of Job	Livingston, NJ	Exemption Status	

Job Summary (includes purpose and goals of job)

Develops new prospects and interacts with existing customers to increase sales of an organization's products and/or services. Works with customers to find what they want, create solutions and ensure a smooth sales process. Coordinates with entire sales team and sales administrator to ensure company sales goals are realized. Monitors and tracks personal sales goals and seeks help, instruction and support to meet and or exceed personal and team sales goals.

Major Job Duties/Functions and Key Tasks below each Function

The following statements describe the general nature and level of the work. Other duties may be assigned.

1. **Client Acquisition:**
    a. Actively cold canvasses for new work. This includes:
        i. Walking into stores, offices and restaurants who need window treatments and awnings.
        ii. Leaving door knockers at neighbor's homes after sales appointments
        iii. Coordinating with sales administrator in mailing to new home sales listed in Sunday Star Ledger
        iv. Pursuing builder leads and bid opportunities that come in through email, Blue Book, Home Advisor, etc.
    b. Networking with designers, builders and previous clients.
    c. Create detailed notes during existing client appointments to develop follow up plan for future work and referrals.
    d. Service all potential and current customers with impeccable service to create loyalty and repeat business.

2. **Sales Process**:
    First Contact, First Appointment:

a. Contact every new appointment within 2-6 hours of appointment set to introduce yourself and ask about the project. Objective is to build rapport and begin the journey of trust and likability.
b. Arrive at appointment on time. If arrival is expected later than appointment time, place a courtesy update call in route.
c. Professional dress, Window Works shirt for guys.
d. Remove shoes at door if bad weather.
e. Continue the 7 Step Sales Process at the home or office.
f. Ensure you have the appropriate samples at all times and that they are clean and up to date.
g. Take all measurements and all pictures of the spaces discussed.
h. If possible — quote on site and go for 1 visit close.
i. If one visit close is not possible, establish next point of contact with prospect before leaving, get agreement.
j. Update Sales Progression Sheet (SPS).

3. Follow Up, Additional Appointments:

a. Order and send any memos, samples within 1-2 business days.
b. Deliver quote within 1 -2 business days. If this is not possible, either personally or with help of Sales Administrator, make some form of contact within 1-2 business days to let prospect know you are on the job.
c. Once quote is emailed, either personally or with help of Sales Administrator, let prospect know to look for quote in an email.
d. Follow up either when agreed at the visit with prospect or within 3 days to see if they are ready to order.
e. Collect new order or determine if a new quote is needed or an additional visit is needed. Set it up.
f. Update Sales Progression Sheet (SPS).

4. Placing a New Order:

a. Go over deliverables with prospect either in person or on the phone. Line by line, establish clarity on product, service, timeline and monies.
b. Write a fully complete Window Works invoice for every sale. See sample form for all non-negotiable information to be included.
c. Turn order to Sales Administrator to collect deposit (she will get proper red pen sign off)
d. Review order with Sales Administrator for accuracy of measurements and product specs, attach all pictures and installation notes and then send order to Bill for review.
e. Either personally place order or ask Sales Administrator to place it.
f. Monitor and put into motion the process permits, CAD drawings, backorder follow ups.
g. Update Sales Progression Sheet (SPS).

5. After the Installation:

a. Confer with installer for feedback and ideas to improve or to repeat.
b. Send handwritten thank you note with message directly related to something personal to the customer.
c. Call customer 1 week later, ask if they are happy, ask if they would review us on Google or Facebook.
d. Make any follow up notes in your calendar to prompt potential work discussed.
e. Update the Sales Progression Sheet (SPS)
f. Send before and after pictures to Christie for social media.

What does exceptional work look like in this job? Performance Expectations or Results Expected

8. Positive internal and external relationships (employees, customers, and vendors)
9. Teamwork with co-workers
10. Reliable and consistent attendance and punctuality
11. Timely and accurate work product
12. Professional appearance
13. Perform all duties in a manner consistent with Window Works policies, procedures and values
14. Meet or exceed personal sales goals
15. Work collaboratively with team members to meet or exceed both their personal sales goals as well as Window Works sales goals.

a. How is your work evaluated? Who evaluates your work?

a. Supervisor feedback (LuAnn)
b. Customer feedback
c. Sales goals – not met, met or exceeded
d. Quality and accuracy of notes, invoices and installation instructions.
e. Initiative in acquiring independent sales leads not generated by Window Works marketing and Window Works existing client base.
f. Attendance
g. Attitude
h. Willingness to learn, work, support Window Works vision and values.

Skills and background needed for position

- Pride in work
- Attention to detail
- Punctuality
- Analytical / problem solving skills

- Can do attitude
- Team player mentality

v.	*Installer – Window Works*
vi.	**JOB DESCRIPTION**

Direct Supervisor	Carlos Martins	Manager	Bill Campesi
Location of Job	Livingston, NJ	Date	5/11/2020

Job Summary (includes purpose and goals of job)

Primary focus is to lead installation team to deliver exceptional quality work for all customers on time with a positive customer service mentality. Primary responsibilities include setting positive example both in quality of work and in attitude toward customers and co-workers. Oversee installation schedule looking for any possible conflicts or problems and work cooperatively with office administrator to resolve issues. Oversee the other installers in the care and responsibility of their tools, truck and the basement. Communicate to the sales team as well as the administration team positive feedback and constructive ideas so they can be more effective in helping you and your install team execute more one stop installations.

Major Job Duties/Functions and Key Tasks below each Function

1. **All Installers**: **Morning of installation**
    a. Show up early, with a positive attitude, prepared to tackle your day.
    b. Always arrive dressed in clean Window Works shirt, hoodie, jacket.
    c. Come prepared everyday with outdoor work shoes, outdoor shoes / sneakers as well as indoor sneakers / shoes. Outdoor shoes / sneakers are shoes specific to inside installs for rainy, snowy days. Indoor shoes / sneakers are specifically for inside installs only.
    d. Sign in on the timesheet.
    e. Collect your day's paperwork from the file, read it over carefully for notes from the admin staff as well as from the sales team. Always read the IEF as well.
    f. If it is not clear if you are collecting a balance due, clarify before leaving the office.
    g. Load up everything that you need to complete the install. Ladders, tools, product boxes.
    h. Organize your morning so that no matter how much prep work is required, you get to the 1st appointment on time.

Lead Installer: All of above and assists other installers by reviewing their day, confirming they are in proper Window Works attire and they have everything necessary to complete their installs with excellence.

2. **All Installers: In route to destinations**
    a. Always call the customer if you will be arriving more than 15 minutes late.
    b. Be aware you are driving a billboard for Window Works. Drive courteously with safety in mind.

3. **All Installers: At the customer site**
    a. Arrive on time, smile, introduce yourself in a positive professional manner
    b. Clean, neat appearance in Window Works shirt and extra indoor shoes on inside projects.
    c. On large inside projects, the **Lead Installer** will ask the customer for a walkthrough of the project to understand the scope. Always ask the customer if they would like you to begin in a specific area. (example nap time for babies, etc.).
    d. On outside projects, go over with the customer how you intend to complete the install. Use all the information at your disposal (paperwork, install checklist)
    e. Keep pace during installations. You have a schedule to follow. If you know you will be late to the next install always call the customer directly or the office so they can notify the next customer of your new expected arrival time.
    f. Never rush an install, you will increase the chances that a mistake will be made.
    g. Make sure the that you and the customer are on the same page on timing.
    a. Be mindful of what you say in a customer's house, even when they might not be around you could possibly be heard. Always complete respect and honorable behavior on a project site.
    b. Treat every install as if you were installing in your own home.
    c. Be neat and clean up after yourself. If any areas require a dust buster, vacuum, or sweeping, always do it.
    d. Remove all packaging, boxes, debris from the site. Take it with you. Leave areas in the same or better condition in which you found them. Customers will notice a mess even if they don't say anything to you.
    e. Once the install is complete, teach the customer how to use everything and make sure they are satisfied.
    f. Ask for the balance due.
    g. After you know the customer is happy, you are finished with your work, take a few pictures of your install and email to Office Coordinator immediately. *Do not leave site without pictures or having sent them to the office.*
    h. As you are taking pictures and talking with the customer before you leave, if you installed inside products ask the customer if they know we also do awnings and other outside products. If you installed outside, ask if they know about our inside product offerings.
    i. If there are any deficiencies in the product, the sizes ordered, the color or style, call the office and discuss how it will be handled with the customer. Paying particular attention to clients of designers. In almost 100% of the cases, we will want to notify the designer before alerting the customer.

Excuse yourself, go to your truck, make the call to the office or the sales rep and find out how each situation should be handled.

j. Make detailed notes while you are at the project, possibly in the site or at minimum once back in the truck. Notes should be written asap so all details are included. Notes must be written so that anyone reading them can understand the full scope of the problem.
k. If there are manufacturer deficiencies, such as damaged products, stained products or products fabricated incorrectly, always call the office before leaving to find out if the product can stay up or if you need to bring it back.
l. Always take pictures of damaged products so the office can supply them to the vendor.
m. If you must leave an incomplete install, after communicating with the office the course of action, in addition to whatever information it was determined you would convey, always assure the customer the office coordinator will be in touch within 24 hours to let them know the next steps and that we will be working quickly to resolve the issue.
n. Before leaving, always check every room one more time for any tools, paperwork you may have left behind.
b. If you are running late to your next installation by 15 minutes or more, either call the customer or call the office and let them know your expected arrival time.

4. All Installers: End of Day

a. Remove all debris from your truck every night. This include product boxes as well as all personal trash.
b. Return all paperwork, checks to office coordinator.
c. Review all projects with office coordinator, particularly projects with deficiencies.
d. Box and label any product to be returned to vendors and let the office coordinator know where it is.
e. Place all leftover fabric from projects in the specified location. Label it with customer name and room. Indicate on IEF best guess of amount of fabric left over.
f. Review your schedule for the next day as well as the rest of your week.
g. Review the paper work for the following day's installs for any questions, parts, information you might need to complete the install in one visit.
h. Check to see if all products have arrived; open boxes; inspect.
i. Check to make sure you have the tools and if necessary, any special materials needed for the installations.
j. If you have any questions about projects in your schedule, ask questions as soon as you notice it. Do not wait until the day of the install to ask.
k. Figure out what tools, ladders, and product you will be needing for any install. Double check
and make sure you are not missing anything.

l. Check the basement for anything you can clean up. Empty trash cans, wipe coffee area, clean bathroom, look for boxes and other large trash items that can be thrown away.
m. Be proactive and a team player in maintaining the basement. If you see opened product has been there for several days, ask the office coordinator if it needs to be sent back, if it is for a current project or if it can be thrown away.
n. Sign out on the time sheet.
o. Always put yourself in the best possible position to be prepared.

Lead Installer: All of above and reviews everyone's schedule for the next day and remainder of the week.
Check in with each installer that they are clear on their projects and prepared to do them.

5. All Installers: Truck and Tool Care

a. Always keep your truck clean and orderly. Empty it every single night of all boxes, trash and product to be returned to vendors. Your truck may be needed by someone else, respect each other and always leave your truck clean and neat.
b. Restock any used hardware weekly or as your inventory begins to get low, you cannot allow yourself to be out of something on a job site.
c. Check your tires monthly for proper tire pressure.
d. Track when oil changes, inspections, tires or any services need to be done on the truck you drive. Let Lead Installer know when any service is needed so he can coordinate with the office coordinator in scheduling the maintenance.
e. Be prepared for a monthly check of your truck and of your tools.

Lead Installer: All of above and conducts spot checks and monthly review of truck and tool maintenance of installers.

6. All Installers: Responsibilities in the Office

a. Check in boxes, shelve them accordingly and always try to keep projects together. This is critical to minimize boxes being left behind. This can be done before leaving for your appointments if you have time or at the end of the day. But it needs to be done daily.
b. Carefully mark all boxes with customer name on several sides of each box.
c. Take packing slips, or the list of what you have checked in, up to the office coordinator.
d. If you finish your day early, find something to do.
e. Scan the showroom daily for anything that does not belong there. Ask if you can put it away.
f. Vacuum the showroom, empty the trash cans in the office, load your truck for the following day, ask if you can help in any way. There is always something that can be done.
a. Sign in and out every day.

7. **Communication and Teamwork with entire Staff (office, sales, and installers)**
    a. Keep each other informed, always working toward understanding and knowledge.
    b. Work synergistically with team to achieve goals, solve problems, ensure exceptional service is delivered to the customer
    c. And other duties as assigned.

What does exceptional work look like in this job? Performance Expectations or Results Expected

- Customers are exceptionally happy with the installed product and the service, positive, professional manner and professionalism of installation staff members.
- Exceptional installers develop and contribute to a positive name, reputation, and presence in the industry for Window Works.
- Exceptional installers work cooperatively and synergistically with internal team
- Exceptional installers implement improvements to further enhance and streamline the installation process
- Exceptional installers make positive suggestions to further enhance the business and make it grow

a. How is your work evaluated? Who evaluates your work?

- Installers will be evaluated by the Lead Installer and by Billy based on monthly tool and truck checks, feedback and comments from customers, number of projects completed timely and efficiently, overall desire to service our customers and your commitment to your co-workers and the reputation and good name of Window Works.

Skills and background needed for position

- Pride in work
- Attention to detail
- Punctuality
- Knowledge of tools and light construction principles
- Creative thinking skills
- Analytical / problem solving skills
- Confidence on a ladder
- Confidence and an ability to drive large trucks
- Can do attitude
- Team player mentality
- Dexterity and confidence with small power tools.