



*Manual 5*

**R**ESIDENTIAL

**S**ALES

**M**ANAGER'

**O**PERATING

# **M**ANUAL

## **CONTENTS**

1. PREMISE
2. ARRIVAL IN THE MORNING
3. MAINTAIN RESIDENTIAL COVERAGE
4. PROACTIVE MANAGEMENT OF SALES/CALLS
5. BEFORE LEAVING FOR THE DAY

RD: Residential Dispatcher  
RT: Residential Technician  
ROM Residential Operation Manager  
RSM Residential Sales Manager  
RSR: Residential Sales Rep  
RTT: Residential Technician Training

# 1. PREMISE

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*Drive* individual sales; *Drive* Company sales; and *Drive* closing rate

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- 1.1 The residential phone sale is a repetitive process. Performed by a few people, the process is repeated dozens of times a day per rep and tens of thousands of times as a group. The Company is continuously striving to improve the process. It is then imperative that the phone reps follow that process diligently. The RSR OM clearly outlines how the process should be followed by each RSR.
- 1.2 The RSM should follow RSR OM when he/she is answering inbound calls. This manual outlines in detail what the RSM is expected to accomplish in the course of his/her workday. These are not recommendations, suggestions or opinions. They are operating procedures that the RSM is required to follow to the letter. The wisdom of these procedures comes from years of success and failure. We have no time to reinvent the wheel but are always open to improving it.
- 1.3 While the Company understands that some of the instructions may be missed in the daily grind, any omission should be exceptional rather than chronic. We are a dynamic company in a dynamic industry. This OM is a live document that should evolve on a timely base. If anything in this OM is obsolete, wrong, irrelevant or redundant, it should be brought to the supervisor's attention. The supervisor will gladly change the OM if the RSM's recommendation is positively reviewed. Until the OM is updated, the RSM should follow it as it is.
- 1.4 It is understood that not every situation requires the RSM to follow all the steps listed in this OM. Some of the procedures just do not apply on a given day, situation or time. The Company is making it clear that steps may be skipped because they do not apply, NOT because the RSM deems them unnecessary. When in doubt, ask the supervisor for permission, not forgiveness.

- 1.5 The Vice President is responsible for demand creation or in our jargon “make the phone ring”. Henceforth, he/she will be heavily involved in directing the operations of residential sales. He/she will intervene frequently at the strategic, tactical and operational levels.
- 1.6 Due to the close working relationship with the RD, the RSM is expected to have a thorough understanding of RD OM.

## **2. ARRIVAL IN THE MORNING**

- 2.1 Check with the RD for any sick calls/truck issues that might create issues for the sales team.
- 2.2 If there are cancellations for the day, it is the responsibility of the RSM to make outgoing calls to move customers up on the schedule to replace the lost appointment. Our goal is always to have a minimum of 3 jobs per day.
- 2.3 Check emails in the morning to identify any potential issues for the RSM or the sales team.
- 2.4 Facilitate a daily scrum meeting at 9 am to delve into cancellations, vehicle-related issues, and sick calls. Discuss the sales goals for the day and analyze closing rates from the previous day. Utilize this gathering not only to address challenges but also as a platform to inspire and motivate the team, setting a positive tone for the day ahead.
- 2.5 Check after-hour phone messages and assign the return calls to the sales team.

## **3. MAINTAIN RESIDENTIAL COVERAGE**

- 3.1 The RSM is solely responsible for keeping our retail presence "on" from 7:30 AM – 6:00 PM Monday to Friday and 7:30 AM - 3 PM on Saturday. Have RSRs available to answer inbound calls continuously during that period. In the event of an RSR is sick or on holiday, it is the responsibility of the RSM to make alternative schedule arrangements, ensuring that the required sales coverage is maintained
- 3.2 The RSM should be available by phone after hours if situations arise when the RSRs need help with customer service issues.

- 3.3 Only one member of the residential sales team can be on holiday at a time.
- 3.4 All holiday requests have to be submitted using Form 15 and submitted to the VP for approval.
- 3.5 The RSM is part of the sales team and is responsible for ensuring that customer calls are not being missed.

#### **4. PROACTIVE MANAGEMENT OF SALES/CALLS**

- 4.1 The RSM holds the responsibility of maintaining the sales team's closing rate at 70% or above. The RSM has to identify and implement corrective measures if this Key Performance Indicator (KPI) falls short of the 70% target.
- 4.2 The RSM is tasked with ensuring that every member of the sales team adheres to the company's designated RSR script. Strict adherence to the script is mandatory, and it falls under the purview of the RSM to guarantee that the entire sales process, as outlined in the RSR OM is consistently followed by both him/herself and the entire residential sales team.
- 4.3 The RSM must foster, coach, and implement changes to ensure that each team member engages customers in a professional manner. Customer engagement stands as a pivotal factor in our sales success, underscoring the importance of training the team on this essential aspect of the sales process. Emphasizing that the team is a sales force, not merely order takers, is crucial for establishing this mindset among all RSRs.
- 4.4 The RSM is accountable for ensuring that every member of the sales team consistently updates the disposition of all incoming calls to the phone system. It is the responsibility of the RSM to mitigate if these conditions are not met.
- 4.5 The RSM is responsible for intervening in situations where customers display verbal aggression, use offensive language or engage in arguments with RSRs.
- 4.6 The RSM is the second point of contact for customer complaints, with the RD being the primary contact. When the RD is on holiday or absent from his/her desk, the RSM shall step in to address and manage customer complaints.
- 4.7 The RSM oversees the sales team members for accurately inputting data into the

system. Such data include address, phone number, and email. The RSM should also implement corrective steps to address any inaccuracies and avoid duplicate data. It is crucial to ensure the reliability of information since inaccurate or duplicate data can lead to serious issues for the RTs in the field. Additionally, work orders need to be entered in the Servicebox app at least two days before the scheduled appointment.

- 4.8** The RSM will conduct/evaluate two calls per week for each sales representative to ensure compliance with the company's sales guidelines, as outlined in the RSR OM. The results of these assessments will be documented in Form 18 and shared with both the RSRs and the Vice President.
- 4.9** The RSM will monitor the success of each RSR by tracking daily sales and the number of inbound calls. The percentage of closings achieved by each RSR will be shared with the entire team. For those not meeting the threshold of 70%, it is the responsibility of the RSM to provide both an action plan and coaching sessions to help him/her improve.
- 4.10** The RSM is accountable for preventing missed calls during business hours. This entails being prepared to answer incoming calls promptly and being signed into the call queue as required.
- 4.11** The RSM plays a pivotal role in maintaining a harmonious work environment by resolving employee disputes promptly. The RSM will act as a mediator to understand concerns, find common ground, and implement solutions that boost unity and motivation in the sales team.
- 4.12** The RSM must ensure that the sales team is making outbound calls to website leads identified by ZOHO CRM. Additionally, all leads coming in during the day should be followed up before calling the day. Leads are from customers who are closer to purchasing our services. If unattended, they may book with a competitor.

## **5. BEFORE LEAVING FOR THE DAY**

- 5.1** It is crucial that the RSM attends to any significant issues before departing.
- 5.2** Emails received during the day should be returned before leaving at the end of

the day. If an immediate answer is not possible, it is essential to inform the customer that their email has been received, and a response will be provided on the next business day. Not responding to a customer's email inquiry the same day, even while waiting for information, is not acceptable.

- 5.3** The RSM must ensure that any voicemail received gets returned the same day. It is not acceptable to leave the customer without a response or answer back “in the morning”.