



Manual 6

RESIDENTIAL **S**ALES **R**epresentativ e'

OPERATING

MANUAL

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RD: Residential Dispatcher

RT: Residential Technician

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

1. PREMISE

We don't take orders; **We** market our services.

We don't get work by pressing the homeowner; **We** land jobs by giving advice.

We don't sell on incomplete price; **We** complete on overall value.

We are not the cheapest; but **We** are the best

We rely on our RSRs to educate homeowners, sales will come naturally!

- 1.1 This manual outlines in detail what a Residential Sales Representative (RSR) is expected to accomplish and what sales procedures to follow in the course of his/her workday. These are not recommendations, suggestions or opinions. They are operating procedures that all RSRs are required to follow to the letter. The wisdom of these policies is built from years of learning. We have no time to reinvent the wheel but should always be open to improving it.
- 1.2 The RSR's responsibilities encompass engaging with customers, effectively promoting and selling our services, scheduling appointments, possessing in-depth knowledge of our offerings, and facilitating payment transactions with homeowners. This role is integral in providing a seamless and positive customer experience across various aspects of our services.
- 1.3 RSRs are expected to meet Key Performance Indicators (KPIs) related to closing sales. This involves effectively guiding customers through the sales process, addressing their needs, and successfully securing commitments for our services. Meeting these expectations contributes to the overall success of the team and the achievement of organizational goals.
- 1.4 RSRs must possess a high level of organization, a clear understanding of the job expectations, and a professional demeanour when representing Power Vac /

National Duct especially dealing with difficult callers.

2. STARTING THE DAY

As a sales representative, the first things to do in the morning are crucial for setting a positive and productive tone for the day. Here are some key activities to prioritize:

2.1 Review Daily Goals:

- 2.1.1 Begin by reviewing sales goals and targets for the day.
- 2.1.2 Understand the specific targets, quotas, or objectives that the RSR aims to achieve.
- 2.1.3 Discuss any issues about scheduling, sick calls with the RSM.
- 2.1.4 Daily scrum with the RSM.

2.2 Check Communication Channels

- 2.2.1 Check emails, voicemails, and any other communication channels for updates, messages, or leads that may have come in overnight.
- 2.2.2 Respond promptly to urgent matters.
- 2.2.3 It is important that emails and voicemails left after hours by customers are looked after first thing in the morning.

2.3 Prioritize Tasks: Create a to-do list for the day, prioritizing tasks based on urgency and importance. This helps in organizing the workflow and staying focused on high-priority activities.

2.4 Review Zoho CRM: Ensure that the RSR's Zoho is up to date. Record any new information, interactions, or progress made with leads or clients. Review new leads assigned.

3. ZOHO CRM

Calling leads in Zoho first thing in the morning is crucial as it capitalizes on the immediacy of homeowners' interest. Hot leads are more likely to have a sense of urgency, and addressing this need promptly increases the likelihood of a sale.

- 3.1** Any new leads that come from incoming calls should be quoted in Zoho CRM only, not Service Box
- 3.2** It is important to update the questions asked field for the quote.
- 3.3** Zoho CRM is designed to showcase a local presence in all the markets we serve. RSRs need to ensure that quotes not only display the correct address but also include our address prominently. This practice reinforces our identity as a local business, aligning with customer preferences.
- 3.4** When issuing a quote, accurately select the appropriate brand (Power Vac or National Duct)
- 3.5** Zoho CRM leads will be distributed equally among RSRs.
- 3.6** When offering a quote to a potential customer who has contacted us but hasn't committed to an appointment, it is imperative to propose sending an email quote. Sending a quote via email not only enhances the likelihood of closing the sale but also provides valuable information to the client that he/she won't find elsewhere. Email follow-up is marketing.
- 3.7** If an RSR makes an outbound call to a potential customer and reaches their voicemail, it is important to email the "Missed You" template promptly. This not only increases the likelihood of the customer returning the call but also ensures he/she is informed about the purpose of the call. In this digital era, many people do not take the time to check their voicemail.

- 3.8 It is essential to follow up on email quotes within two business days.
- 3.9 Ensure that all Zoho leads, which successfully convert into booked appointments, are promptly updated with the respective date and scheduled time. This practice is crucial for maintaining accurate and up-to-date records, facilitating efficient communication, and streamlining the scheduling process for the team.

4. HANDLING THE CALL

It is inherent and vital for the customer to play a role in the buying process. An overly aggressive sales approach can lead to customer resistance and a defensive attitude. Asking relevant questions about the customer's house is crucial. The more engaged the customer is in the conversation, the higher the likelihood of successfully closing the sale.

- 4.1 The optimal duration for a phone call in a home service business can be influenced by the nature of the conversation and the customer's specific needs.
 - 4.1.1 Striking a balance between thoroughness and efficiency is recommended. Ideally, a call should last between 7 and 9 minutes.
 - 4.1.2 This timeframe provides ample time to address customer inquiries, collect necessary information, and convey details about the services without extending the call unnecessarily. It remains crucial to assess the customer's engagement and ensure that their questions or concerns are adequately attended to within this reasonable timeframe.
 - 4.1.3 When engaging in phone conversations with customers, it is important to adopt a deliberate and clear speaking pace. Speaking slowly and enunciating words ensures effective communication, allowing customers to better understand the information being conveyed and contributing to a positive and productive interaction.
 - 4.1.4 It is crucial to accurately label the disposition of each call on the handset. This practice enables us to track our success rate in terms of the percentage of closings. For calls that are not sales-related, the RSR should designate them as "admin calls" to ensure proper categorization leading to effective analysis of call data.
 - 4.1.5 All incoming calls should be answered with a courteous greeting such as, "Good morning/afternoon, thank you for calling Power Vac/National Duct. How can I assist you today?" This professional and welcoming approach sets a positive tone for the conversation and reflects our commitment to excellent customer service.

4.2 Engagement

4.2.1 It is natural and important that the customer be part of the buying process: If the sales process is too pushy the customer will push back and have their defense up.

4.2.2 It is important that the RSR ask questions about the house. The longer the customer is on the phone the higher the odds of closing the sale.

4.3 Asking questions

Engaging customers by asking questions about their house is a time-tested practice. While these questions may not always appear crucial to us, they signal to the customers that we genuinely care about their concerns. It demonstrates our commitment to understanding the unique setup of their home, reinforcing a customer-centric approach and building a rapport based on personalized attention. So start by asking the following 11 questions:

4.3.1 *“Would you mind if I ask you a few questions about the house? It will help me provide you with an accurate quote. I can also answer any questions that you may have and schedule a service call if you are interested”*

4.3.2 *“Have we cleaned the ductwork before?”* (Respond with yes/no) This presents an excellent opportunity to communicate our extensive experience, highlighting our 57 years in business and having serviced thousands of houses over the years. If it is a repeat customer, look up his/her file in the system

4.3.3 *“How did you learn about our services?”*

4.3.4 *“Are there any specific concerns you would like us to address?”*

4.3.5 *“What is the age of your house?”*

4.3.6 *“Do you know the total square footage of your home?”*

4.3.7 *“Is your residence a bungalow, two-storey, or split-level home?”*

4.3.8 If applicable, *“Is your basement finished, and is the ductwork visible in the furnace room?”*

4.3.9 *“Can you provide the number of supply and return vents in your home?”*

4.3.10 For older homes, *“Are there back-to-back wall vents (one vent serving*

two rooms)?” This inquiry is aimed at demonstrating the potential of cost-saving.

4.3.11 “Do you have a driveway?” This information is essential for customers in Hamilton and Toronto.

- 4.4 We would never want our sales team asking *“How many vents do you have and our price is xxx “*. Remember that we are a sales team and our goal is to win customers on the fence. We are not order takers servicing those who only want to book an appointment.

5. PRESENT THE VERBAL QUOTE

- 5.1 After the RSR has asked the required questions, he/she can present the verbal quote
- 5.1.1 Our cost to clean the ductwork in your home with xxx vents is \$\$\$.
- 5.1.2 This price consists of a full system clean, including cleaning all your supply and return vents. We will also clean the furnace, the fan, the fan housing and the AC coils. (not to be confused with the AC condenser located outside) The process will take approximately 2 to 2.5 hours.
- 5.2 Additionally, it's essential to highlight our commitment to customer satisfaction by offering a guarantee on our work for up to one year.
- 5.3 When presenting a quote to the customer, the RSR should introduce the features and benefits offered by Power Vac/National Duct :
- 5.3.1 **Established Since 1966**, over 57 years in the industry, bringing extensive experience and reliability.
- 5.3.2 **BBB Accreditation**: proud member of the Better Business Bureau, emphasizing our commitment to ethical business practices.
- 5.3.3 **NADCA Membership**: Affiliated with the National Air Duct Cleaners Association, showcasing our dedication to industry standards and best practices.
- 5.3.4 **Extensive Fleet and Coverage**: Operating 30 + trucks daily, providing service across most of Southern Ontario for comprehensive coverage.
- 5.3.5 **Outstanding Google Reviews**: Most reviewed duct cleaning service in Ontario boasts a remarkable 4.8 rating on Google reviews, a testament to the quality of our services and customer satisfaction.
- 5.3.6 **Technicians' Expertise and Assurance**: All our technicians are bonded

and insured, ensuring professionalism, reliability, and peace of mind for our customers.

5.3.7 Transparent pricing. No hidden costs

6. ASK FOR THE ORDER

- 6.1** Upon presenting the potential client with the price, it is crucial to directly ask for the order. Avoid making assumptions about the customer's inclination and make a clear inquiry about their decision to purchase.
- 6.2** Delay discussing how the price may vary based on vent count until a scheduled commitment is secured from the customer.

7. BOOK THE ORDER

- 7.1** In the process of customer confirmation, ensure accuracy for the following details. Securing accurate information in these areas is essential for effective communication and service provision.
 - 7.1.1 Name:** Kindly verify your full name to maintain precise records.
 - 7.1.2 Address:** Please confirm your current residential or business address to ensure accuracy in service delivery.
 - 7.1.3 Email Address:** Obtaining your email is imperative for communication. Kindly provide or validate your email address, ensuring its accuracy.
 - 7.1.4 Phone Number:** Please confirm your contact number for efficient communication regarding updates or clarifications.
- 7.2 Getting ready for our visit**
 - 7.2.1** Advise that their car should be moved from the driveway to allow our technician to back the truck up efficiently for smooth service delivery.
 - 7.2.2** Our technician will carry a debit machine for convenient payment upon completion of our services. Please note that we do not accept credit cards or cash. Payment is due promptly upon the conclusion of our services. If the customer insists on using a credit card, then, state that credit card transactions will incur a 2.5% surcharge. Otherwise, do not mention it.
 - 7.2.3** Should there be any changes to the schedule, please provide a minimum of 48 hours notice for better accommodation. Please note that we require 48

hours notice for cancellations. Last-minute cancellations will incur a \$75 charge.

- 7.3 Once the order is secured, confirm the correct address, phone, and email.
- 7.4 Confirm that the price is based on the number of vents and if there are more or fewer vents, the price will change by \$ __ per vent.

8. SALE NOT WON

8.1 In cases where a sale is not immediately secured, it's crucial to provide an email quote through Zoho CRM. Offering an email quote enhances the chances of winning the sale by keeping the communication channel open and providing the potential customer with detailed information they can review at their convenience. This proactive approach demonstrates professionalism and commitment, potentially prompting the customer to reconsider and choose our services.

8.2 Follow up with the quote within 2 business days.

8.3 Educating customers on what to look for in a duct cleaning contractor is essential for fostering trust and preventing scams. Here are key points that need to be stressed:

8.3.1 **Comprehensive Service Inclusions:** Ensure that cleaning the fan, furnace and AC coil are integral to the service, not an add-on or upsell. Contractors who omit these details may attempt upselling.

8.3.2 **Service Understanding:** Have a clear understanding of what is included in the service to avoid surprises. Transparency is key.

8.3.3 **NADCA Certification:** Hire a NADCA Certified contractor as they adhere to NADCA Standards, ensuring thorough cleanliness and professionalism.

8.3.4 **Beware of Low-Ball Pricing:** Be cautious of contractors with unusually low prices; they may use this tactic to enter and upsell once inside the home.

8.3.5 **Time Investment:** Recognize that a good cleaning should take at least 2 hours, not a rushed 45 minutes. Quality work requires time and attention.

8.3.6 **Professional Equipment:** Hire professionals who use the right equipment, not makeshift solutions like shop vacs. Proper tools ensure a thorough and effective cleaning.

8.3.7 **Warranty Assurance:** Reputable professionals will offer a warranty, providing peace of mind for the customer regarding the quality of the service.

8.3.8 **Avoid Unverified Contractors:** Steer clear of contractors found on Facebook or Kijiji who lack a local presence, prefer cash transactions, lack a

website, and rely solely on messaging. This may indicate unprofessionalism.

8.3.9 Caution with Heating Contractors: Be wary of heating contractors promoting air duct cleaning solely to upsell HVAC equipment. Genuine duct cleaning should stand alone as a valuable service.

8.3.10 By emphasizing these points, we aim to assure customers that choosing our services mean prioritizing their needs, transparency, and delivering a trustworthy and thorough duct cleaning experience.

9. ADD ON SALES

- 9.1** Refrain from engaging in discussions about additional sales or upselling. Our goal is to structure our service pricing in a manner that remains competitive and comparable to others in the market.
- 9.2** Homeowners may appreciate all the add-on services but once we add up all the costs plus HST, they got sticker shock and are scared away completely.
- 9.3** Let the RTs to the add-on sales. At least, the homeowner could not cancel the job then.

10. BEFORE LEAVING EVERY NIGHT

- 10.1** Quotes should be sent out
- 10.2** Emails should be completed
- 10.3** All jobs booked and scheduled within 2 scheduling days should be keyed into Service Box

By adhering to our sales system, RSRs will witness the effectiveness of our approach in securing jobs. Achieving our Key Performance Indicator (KPI) of a 70% closing rate is easily attainable by following these steps. The strength of our brands and our outstanding reputation simplifies the

process of selling our services. Customers seek good value and fair, honourable treatment, and they are inclined to make a purchase when these conditions are met. It is the RSR's responsibility to educate the homeowner on making informed decisions. Ultimately, customers desire a hassle-free experience where they only need to pay once, and we strive to deliver precisely that.