

OFFER LETTER: ENTRY LEVEL SERVICE SALESPERSON

October 9, 2011

Mr. Edward C. Salesperson
1000 So. 100th Street
Anytown, USA 55555

Subject: Employment Offer

Dear Edward:

We are pleased to offer you the position of **Service Salesperson** within the Service Group of XYZ Mechanical. The **attached job description** explains this position further, but to summarize, **your job duties shall include** but not be limited to:

- Generating Sales Leads
- Sales and Estimating of New and Expansion of Existing Planned Maintenance Agreements
- Service Job Take-offs
- Developing and Maintaining Customer Relationships
- Identifying new work opportunities for all XYZ Mechanical business units

While this position shall include selling service-related projects it is anticipated that additional sales potentials and sales leads will be generated for other divisions within the XYZ Mechanical structure in the course of your sales efforts. Although you may not be responsible for the actual takeoff, technical proposal, or sale in these cases, **generating leads for other departments** is an important additional role as part of the sales team and is an expectation of management for this position.

The **compensation and benefits** package in this offering shall include:

- Annual base salary \$XX,000.00 plus commission (**see next page**)
- One (1) week vacation
- Monthly car allowance of \$XXX plus \$0.XX per company-driven miles
- Company-provided cell phone
- Company-provided laptop computer
- 401K
- Health and dental insurance
- \$XXX monthly additional if company-provided insurance is declined
- Paid holidays



October 9, 2011
Edward C. Salesperson

Summary:

Base salary	\$XX,000.00
Auto allowance	\$ X,XXX.00
Commission rate	X% of Planned Maintenance Sales Sold up to \$XXX,XXX.00
	X% of Planned Maintenance Sales over \$XXX,XXX.00

Commission Examples:

- \$250,000 maintenance sales would equal \$ _____
- \$200,000 maintenance sales would equal \$ _____

- \$150,000 maintenance sales would equal \$ _____
- \$100,000 maintenance sales would equal \$ _____
- \$75,000 maintenance sales would equal \$ _____

We are pleased to offer this opportunity to you and are excited to have you join our team. We would like a commitment of acceptance by <date>, with an expected start date to be determined based on your current job responsibilities. Please review this offer and if acceptable, **sign and return the enclosed acceptance form** indicating your agreement with terms of this offer. Feel free to call me with any questions or concerns you may have.

Sincerely,

Joe Hiringmanager
Human Resources Director
XYZ Mechanical



OFFER LETTER: SPECIAL PROJECTS - PROJECT MANAGER

October 9, 2011

Mr. Thomas A. Organizedguy
5843 Field of Dreams Court
Anytown, USA 55555

Subject: Employment Offer

Dear Thomas:

We are pleased to offer you the position of Special Projects-Project Manager within the Mechanical Group of XYZ Mechanical. In this position your job duties shall include but not limited to:

- Generating Sales Leads
- Sales and Estimating of New and Expansion of Existing Customers
- Handling project leads from the Service Group
- Estimating
- Developing and Maintaining Customer Relationships
- Identifying new work opportunities for all XYZ Mechanical business units
- Project Management

While this position shall include selling, estimating, and project managing it is anticipated that other sales potentials and sales leads will be generated for other divisions within the XYZ Mechanical structure. Although you may not be responsible for the actual takeoff, technical proposal or sale, generating the lead is an important role and an expectation of the management.

The benefits package in this offering shall include:

- o Annual base salary of \$XX,000.00 (See commission plan on next page)
- o Two (2) weeks accrued vacation pro-rated (per company policy manual)
- o Health and dental Insurance
- o Company vehicle allowance of \$X per month with XX cents for company-driven mile
- o Company-provided cell phone
- o Company-provided laptop computer
- o Paid holidays
- o Five (5) PTO days pro-rated (per company policy manual)
- o Bonus incentive (based on department and company results)
- o 401K Plan with 3% company match

We are pleased to offer this opportunity to you and are excited about the future possibilities. We are currently holding this position open for you with a commitment of acceptance by <date>. Please review this offer and call me with any questions or concerns that you may have.

Sincerely,

John D. Hiringmanager
Director, Human Resources

Base Salary	Revenue \$	Average GM%	Commission % of total Revenue
\$XX,000	\$500,000	<22%	\$0
	>\$500,000	22-23%	1%
		23-24%	2%
		24-25%	3%
		25-27%	4%
		>27%	5%

Example

\$XX,000	\$ 800,000	22%	1%	\$XX,000
\$XX,000	\$1,000,000	22%	1%	\$XX,000
\$XX,000	\$1,000,000	23%	2%	\$XX,000
\$XX,000	\$1,000,000	24%	3%	\$XX,000
\$XX,000	\$1,500,000	22%	1%	\$XX,000
\$XX,000	\$1,500,000	23%	2%	\$XX,000
\$XX,000	\$1,500,000	27%	5%	\$XX,000

Commission + Salary

OFFER LETTER: EXEPIERIENCED SALESPERSON

April 18, 2012

Mr. Mark F. Goetter
124 Roundabout Way
Anycity, WI 55555

Subject: Employment Offer

Dear Mark:

We are pleased to offer you the position of Service Sales Representative within the Service Group of XYZ Mechanical. In this position your job duties shall include but not limited to:

- Generating Sales Leads
- Sales and Estimating of New and Expansion of Existing Planned Maintenance Agreements
- Service Job Take-offs
- Developing and Maintaining Customer Relationships
- Identifying new work opportunities for all XYZ Mechanical business units

While this position shall include selling service-related projects it is anticipated that other sales potentials and sales leads will be generated for other divisions within the Bandy Mechanical structure. Although you may not be responsible for the actual takeoff, technical proposal or sale, generating the lead is an important role and an expectation of the management.

The benefits package in this offering shall include:

- o Annual base salary **\$XX,000.00 plus commission** (see next page)
- o Two (2) weeks vacation
- o Monthly car allowance of \$XXX plus \$0.XX per company-driven miles
- o Company-provided cell phone
- o Company-provided laptop computer
- o 401K
- o Health and dental insurance
- o \$XXX monthly additional if company-provided insurance is declined
- o Paid Holidays

Summary:

Base salary	\$XX,XXX.00
Auto allowance	\$ X,XXX.00
Commission rate	7% of Planned Maintenance Sales Sold up to \$100,000.00 10% of Planned Maintenance Sales over \$100,000.00

October 9, 2011
Mark Goetter

Commission Examples:

- \$250,000 maintenance sales would equal \$XX,000.00
- \$200,000 maintenance sales would equal \$XX,000.00
- \$150,000 maintenance sales would equal \$XX,000.00
- \$100,000 maintenance sales would equal \$X,000.00
- \$75,000 maintenance sales would equal \$X,000.00

We are pleased to offer this opportunity to you and are excited about the future possibilities. We are currently holding this position open for you with a commitment of acceptance by <date>, and an expected start date to be determined based on your current job responsibilities. Please review this offer and call me with any questions or concerns you may have.

Sincerely,

John Hiringmanager
Human Resources Director

OFFER LETTER: TECHNICIAN TO SALESPERSON

April 18, 2012

Mr. Robert J. Technician
111 Prosperity Street
Anytown, USA 55555

Subject: Employment Offer

Dear Robert:

We are pleased to offer you the position of Service Sales Representative within the Service Group of XYZ Mechanical. In this position your job duties shall include but not limited to:

- Generating Sales Leads
- Sales and Estimating of New and Expansion of Existing Planned Maintenance Agreements
- Service Job Take-offs
- Developing and Maintaining Customer Relationships
- Identifying new work opportunities for all business units

While this position shall include selling service-related projects it is anticipated that other sales potentials and sales leads will be generated for other divisions within the Accurate Mechanical structure. Although you may not be responsible for the actual takeoff, technical proposal or sale, generating the lead is an important role and an expectation of the management.

The benefits package in this offering shall include:

- Annual base salary (**Current local 575 Scale**)
- Two (2) weeks accrued vacation pro-rated (per company policy manual)
- Company vehicle
- Company-provided cell phone
- Company-provided laptop computer
- Paid holidays
- Five (5) PTO days pro-rated (per company policy manual)
- Bonus incentive (based on department and company results)

We are pleased to offer this opportunity to you to transition from the field and are excited about the future possibilities. We are currently holding this position open for you with a commitment of acceptance by <date>. Please review this offer and call me with any questions or concerns you may have.

Sincerely,

Joe Hiringmanager
Director, Human Resources

NEW HIRE CHECKLIST

Forms to be completed by new hires:

PAYROLL/HR

- Form W-4 Employee Federal Withholding Allowance Certificate
- Form-xx State Withholding Allowance Certificate
- Form I-9 US Dept of Justice Employment Eligibility Verification
- Enrollment/Change Form (Health, dental, vision, FSA, Supplemental Life/AD&D)
- Application for Employment and Application Addendum
- New Employee Information (Self-ID Form)
- New Employee Information Supplemental (Trades)
- Driver Consent Form
- Direct Deposit Authorization
- Payroll Deduction Authorization
- Dues Authorization

COMPANY POLICIES AND SAFETY ACKNOWLEDGEMENTS

- Asbestos Policy Form
- Safety Glasses Policy
- Seatbelt Policy
- Smoking Policy
- Personal Purchase Policy
- Safety Manual
- Safety Manual Acknowledgement
- Internet and Networking Acceptable Use Policy
- Acknowledgement and Acceptance of Internet and Networking Acceptable Use Policy
- Harassment-Free Workplace Policy Acknowledgement
- Values Book
- Value Acknowledgement
- COBRA Rights
- Compliance Training Requirements

ADDITIONAL STEPS (when applicable)

- Issue employee ID/key card
- Set up user ID and password for computer
- Issue credit card
- Issue company cell phone/radio/pager
- Make copies of employee's training cards (OSHA, 10-Hour, Forklift, etc.)
- Review orientation tape

Date of Hire _____ Date Orientation Completed _____

Orientation conducted by: _____ Signature _____

New Employee: _____ Signature _____



NEW HIRE ORIENTATION LETTER

[Date]

Mr. Edward C. Salesperson
1000 Integrity Road
Anytown, USA 55555

Re: Mechanical Service Sales Position

Dear Edward:

Welcome to XYZ Mechanical!

We are excited to have you join our Service Sales Team and look forward to working with you and growing the service business. Mechanical Service Sales at XYZ Mechanical is a great career opportunity. Enclosed are some details that cover orientation and training. Again, welcome aboard!

FIRST WEEK ORIENTATION

- Day One – Company paperwork, I.D. badge, office set up, safety training, department introductions and Company procedure review.
- Day Two – Same as above, plus computer training, review of the Service cycle, meet Service team & review job descriptions, employee handbook, review of [Company] capabilities, and I.C. Standards (P.M. and Superintendent roles).
- Day Three – (Same as above) plus review Sales Literature, Sales tools, Marketing Materials and Sales tracking forms.
- Day Four – (Same plus) Review customer call methods, contact lists, customer tracking programs.
- Day Five – (Same plus) Review estimating procedures/forms, Maintenance Agreement forms, Proposal writing.

2ND WEEK ORIENTATION

- Continuation (same as above) plus review of all Mechanical Service procedures.
- Review of different types of Maintenance Agreements and service pricing.
- Review methods of customer prospecting/qualifying and competitive intelligence.
- Review required profitability, contract rates, mark up structure and equipment estimating tables.
- Review and begin customer calling strategies to set up meetings.
- Attend sales appointments with sales staff.
- Review all types of Mechanical systems for basic knowledge.
- Review basic customer presentation format.



3RD AND 4TH WEEK ORIENTATION

- Continuation (same as above) review sales and estimating strategies.
- Review sales and customer acquisition goals.
- Discuss Team selling initiative between all departments.

SALES GOALS

To sell Maintenance Agreements with minimum goal gross margin dollars based on Company service department standards.

Service department growth is typically based on the following:

- New customer acquisition
- Preventative Maintenance agreements
- Small projects/repairs
- Service work (T&M)
- In-house equipment startup

To effectively grow the service business, will require a focused plan with a strong emphasis on capturing both new customers, and service/maintenance agreements. The first step in sales development will be to set sales goals or “non-negotiables.” These non-negotiables will be individual based. The following sales goals have been established and will be tracked on a Monthly basis.

- 1) Acquire \$_____ in new Preventative Maintenance Agreements.
Responsibility: [Salesperson Name]
Completion Date: 12/31/11
Note: The above sales goal will be **pro-rated**.
- 2) Increase repeat customer base by obtaining _____ New Customer Facilities.
Responsibility: [Salesperson Name]
Completion Date: 12/31/11
Note: The above customer goal will be **pro-rated**.
- 3) Identify and track intercompany leads provided to all departments.
Responsibility: [Salesperson Name]
Completion Date: Ongoing
- 4) Learn and maintain good working knowledge of Mechanical Service Sales and estimating practices through on-going Sales Training.
Responsibility: [Salesperson Name]
Completion Date: 12/31/11
- 5) Continually meet with Project Managers to identify current or past jobs that present opportunity for potential Maintenance Agreements.
Responsibility: [Salesperson Name]



Completion Date: Ongoing

As a new sales employee we will conduct a 3-month, 6-month and 9-month progress review to ensure that both sales and training are on track with the above established goals.

SALES TRAINING

“The hardest part of selling is being properly prepared to sell.”

Sales Training will always be an on-going process. Service sales meetings will begin on a weekly basis and will cover sales reporting, success stories, sales activity, work acquisition, networking, operations interface and education/training.

Supplemental sales training will include:

- **MSCA Selling Skills Training Program**

This is a three-day program (industry specific) for HVAC sales reps to improve their sales effectiveness and to understand the interpersonal skills needed to sell Mechanical Services. Because of your past sales training this may/may not be required at a later date.

- **MSCA “HVAC 101” Webinars**

This is a training program on HVAC, for Company employees who are new in the field. This program is based on a series of webinars (along with a basic reference guide).

- What is HVACR, what do we do? What are our products and how do we deliver them?
- HVACR service and construction terms and slang that we use.
- HVACR basic science and heat transfer
- A/C basics small tonnage
- A/C basics large tonnage
- Air flow systems and types
- Types of commercial systems
- Fans, Pumps and Misc. Equipment
- Heating systems
- Focus on the customer

- **MSCA Training on Energy Services**

This is a service training program on selling energy services based on a series of webinars. The purpose of this training is to incorporate energy service agreements (ESA's) with current maintenance agreements.

- Module 1: Value-Added Service: The Value of Energy Benchmarking to MSCA Members
- Module 2: How to Benchmark Energy Performance of Commercial Buildings Using ENERGY STAR Portfolio Manager
- Module 3: Creating and Interpreting Benchmark Results through Customized Reporting



Continued sales education and the ongoing importance of accurate proposals and improved communication are the foundation for positive customer relations and service growth. In addition to the above listed training, additional job specific service sales training methods have been identified and will continually be implemented.

SALES MEETINGS

Service Sales meetings are used to track activity, networking, and are a method for discussing sales strategies. Sales strategies are then practiced and results are reported and discussed. The following is the current sales meeting agenda.

<p>Service Sales Meeting Agenda (Weekly)</p> <ol style="list-style-type: none">1. Success Stories2. Call Activity: calls/meetings3. PMA bid activity/PMA acquisition4. Small project work activity/acquisition5. Customer relationships6. Network opportunities/outings7. Education/ Training8. Operations interface9. Good of the order
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SALES TRACKING

The Service Sales Staff currently utilizes three (3) sales tracking methods as follows:

1) Service Sales Call Log

The service sales call log is an activity tracking log to ensure you are maintaining a high level of sales activity.

2) Estimation of Awarded Sales

This form is a tool to provide management and dispatch operations a “look ahead” to forecast anticipated man-hours to be sold from Maintenance Agreement Sales. It is another method to keep potential customers on the salesperson’s radar. In this form the sales rep assigns a Probability of Job Awarded percentage. This percentage calculates man-hours based on their estimate to provide a method of forecasting for manpower needs. There is a service industry rule that for every dollar sold in maintenance agreement sales, you can expect an additional 2 dollars in pull-through work.

3) Bid Activity Log



The bid activity log is used for tracking sales activity. By using this form, each person will see how they are doing as well as that of the group. This log is tracked on a calendar basis and be restarted to zero every year. This form tracks important benchmarks, such as:

Page 1 details

- Bid type, T&M Lump Sum, Budget and Not to Exceed.
- Bid Status, Open, Lost, Awarded, or Cancelled.
- Activity Type, PM Agreement, Project Work, or Equipment Repair.
- Average Award Size for PMs, Projects and Repairs.
- Customer Type, Commercial, Manufacturing, Institutional, Food/Beverage, or Internal.
- Project Analysis, (bid versus sold ratios) for PM's, Projects, and Repairs.

Page 2 details

- Monthly breakdown of PMA's, Projects and Repairs by Quantity and Dollars.
- Monthly breakdown of PMA's, Projects and Repairs by Ratios.
- Individual and Team Sales Hit Ratios.

Note

It is important to clarify that a good percentage of the inspections, repairs, and projects that we perform are done with a quick phone call, a quoted T&M rate, and a verbal "thumbs up" to proceed with the work (followed by a customer purchase order/signed letter). In these circumstances, a letter is not produced which includes all of the pertinent information. As a group we can discuss a consistent means of entering the information. This log is not meant to capture all of the service work we perform, but rather to produce a document in which we can establish appropriate levels of performance.

In the event you have any questions, please feel free to call me at [your telephone number]. We look forward to seeing you on *[insert start date]*.

Sincerely,

Joe Hiringmanager
Service Department Manager
XYZ Mechanical

