



**Bandy  
Mechanical**

**Main Offices:**  
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Irvine, CA 92602  
Phone: 714.555.5555  
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[www.bandymechanical.com](http://www.bandymechanical.com)

Jan 28, 2011

Mr. Edward C. Salesperson  
1000 So. 100<sup>th</sup> Street  
Greenfield, WI 53228

**Subject: Employment Offer**

Dear Edward,

We are pleased to offer you the position of **Service Sales Representative** within the Service Group of Bandy 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 IKM 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 Illingworth-Kilgust 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 attached plan**)
- Week's vacation
- Monthly Car Allowance of \$600 plus \$0.10 per Company Driven Miles
- Company Provided Cell Phone
- Company Provided Laptop Computer
- 401K
- Health and dental insurance
- \$200 monthly Additional if Company Provided Insurance is declined
- Paid Holidays

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 02/15/11, 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 that you may have.

Sincerely,

David Bavisotto  
Service Department Manager

# Service Agreement First Visit Checklist

## Objective

To enhance clear communication between service department personnel and customer representatives.

## Scope

To be filled out by the salesperson that sold the Preventative Maintenance Agreement.

## Procedure

The salesperson should accompany the Service Technician on the first inspection to introduce the customer to the technician. At this time the salesperson will establish with the customer any special requirements, etc. and record them on this form. The form will be turned in to the Service Coordinator for inclusion in the PMA folder.

Date:

Agreement No.

Those in attendance:

1. Explain the purpose of this visit.

2. Determine where job documents can be stored.

2a. Is job box to be installed?      Yes                      No

3. Determined where parts can be stored.

4. Determined procedure for working in the building:

4a. During the day:

Sign in \_\_\_\_\_  
Notification \_\_\_\_\_  
Parking \_\_\_\_\_

4b. After working hours:

Sign in \_\_\_\_\_  
Notification \_\_\_\_\_  
How to gain access \_\_\_\_\_

5. Determined the procedure for gaining access to restricted areas; mechanical room, roof, offices, computer rooms, etc.

6. Customer contacts:

Name:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Contractors we may have to contact in an emergency:

Plumber \_\_\_\_\_

Phone \_\_\_\_\_

Electrician \_\_\_\_\_

\_\_\_\_\_

Security \_\_\_\_\_

\_\_\_\_\_

**Service Agreement First Visit Checklist, continued**

\_\_\_\_\_

\_\_\_\_\_

8. Determine who should sign the service report:

\_\_\_\_\_ or \_\_\_\_\_

9. Set up communication procedures with building personnel for reporting both emergency and routine trouble calls.

10. Determine critical areas of building, operating hours, and do's and don'ts regarding shut down equipment for maintenance.

11. Determine any current problems:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

12. Review tasking sheets and set date for completing the tasking

12a. Tasking complete by: \_\_\_\_\_

13. Prepare a list of items requiring attention that are not covered in the agreement, maintenance as well as projects.

14. Determine what drawings and other documents are available and where they are.

15. Cold weather will not permit start-up & verification of Air-Conditioning equipment operating condition. Start-up will be performed on or about \_\_\_\_\_(date) and the need for billable repairs, if any, will be determined at that time.

16. Hot weather does not permit operation checkout of heating equipment. This will be done on or about \_\_\_\_\_(date) and the need for billable repairs, if any, will be determined at that time.

NAME:	Wayne Turchetta	WEEK ENDING	3-Jun-11		
Date	Customer	Contact Person	Phone	Type Call	Comments
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
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32					
33					
34					
35					
36					
<b>PAGE</b>	<b>ONE</b>	<b>OF</b>			<b>20 Cold Calls - 10 Face to Face w/EXISTING Customer Weekly</b>
Code: SS: Site Survey; MWO: Meeting with Owner; MWT: Meeting with Technician; OM: Office Meeting;					
CC: Cold Call; FCC: Follow Up Cold Call					

# SITE SURVEY FOR PM AGREEMENT

Customer: \_\_\_\_\_

Jobsite location: \_\_\_\_\_ Date: \_\_\_\_\_

Approximate distance from office \_\_\_\_\_ miles

**Hose bib location (water to clean coils)** \_\_\_\_\_ **feet**

## Security concerns:

Card or Key access: Yes [ ] No [ ]

Security assist: Yes [ ] No [ ]

Vehicle Inspection (Jails): Yes [ ] No [ ]

Check point (UPS): Yes [ ] No [ ]

## Accessibility to roof:

Need 24' ladder Yes [ ] No [ ]

Need 40' ladder Yes [ ] No [ ]

Roof hatch Yes [ ] No [ ]

Second person required: Yes [ ] No [ ]

Security or Key access: Yes [ ] No [ ]

## Filters:

Size and quantity list attached: Yes [ ] No [ ]

Special Size Filters: Yes [ ] No [ ]

Can filters be stored on site: Yes [ ] No [ ]

## Belts:

Size and quantity list attached: Yes [ ] No [ ]

## PM Working Hours:

Normal Business Hour Yes [ ] No [ ]

## Parking:

Near facility Yes [ ] No [ ]

Pay to park Yes [ ] No [ ]

Comments regarding downtime, second person, travel, security, **after hour labor requirements**, over night expenses etc.

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## PM Agreement Sign-Off Sheet

### Submitted to Tina with the following

**Site Survey Sheet Completed (attached)**

**Equipment List (Schedule A) (attached)**

***PM Estimate Review with Wayne (initialed)***

**Copy of Relevant tabs from PM Estimate Spread Sheet**

**Copy of Annual Overview WITH**

- **Billing information**
- **Contact Person**
- **All tabs fill out**
- **Special comments if required**

**Tasking Sheets (attached)**

**Signed Service Agreement (attached)**

**Date turned over to Tina \_\_\_\_\_**

CONTRACT CHECK LIST (Operations)

Contract: Clark Material

Date: 4/18/11

**NEW CONTRACT**

**Add to Existing Contract**

Yes\_\_\_ No\_\_\_  
Yes\_\_\_ No\_\_\_

	<u>Name</u>	<u>Initial</u>	<u>Date</u>
Technician Assigned	_____	_____	_____
Backup Technician	_____	_____	_____
Contract Info & Tasking Sheets Distributed to Technician		_____	_____
Sales Representative review with Technician		_____	_____
Technician sign off - contract was reviewed & tasking sheets were received		_____	_____
Supervisor sign off		_____	_____
Operations Manager sign off		_____	_____

**RENEWAL OF EXISTING CONTRACT**

Yes \_\_\_ No \_\_\_

Technician assignment change?  
If Yes to whom? \_\_\_\_\_  
If Renewal are there changes?  
If Yes, please explain:

Yes \_\_\_ No \_\_\_

Yes \_\_\_ No \_\_\_

	<u>Initial</u>	<u>Date</u>
Tasking sheets distributed to Technician	_____	_____
Sales Review changes with Technician	_____	_____
Technician sign off tasking sheets were received & any changes were reviewed.	_____	_____

**WHEN COMPLETE, RETURN TO TINA HARPER FOR CONTRACT FILE**

HMC Service Company Customer Survey

Dear Valued Customer: In an effort to assure HMC Service Company is providing the service that is expected from our customers, we would greatly appreciate your input to the questions listed below.

For each of the following statements about HMC Service Company, please indicate whether you:

strongly disagree (1); somewhat disagree (2); Neither Disagree or Agree (3); somewhat agree (4); strongly agree (5).

We meet your deadlines for PM inspections:	1	2	3	4	5
We meet your deadlines for repair service:	1	2	3	4	5
We provide fast turnaround for quotes:	1	2	3	4	5
We provide fast turnaround for emergency service:	1	2	3	4	5
We are easy to do business with	1	2	3	4	5
We deal with issues or problems openly and quickly:	1	2	3	4	5
Our company is helpful in providing options to your problems:	1	2	3	4	5
Our employees are accessible :	1	2	3	4	5
Our employees listen to what you have to say:	1	2	3	4	5
Our technicians keep you informed about your equipment:	1	2	3	4	5
Our technicians take ownership and responsibility of your equipment:	1	2	3	4	5
Our technicians are thorough in their approach to servicing your equipment:	1	2	3	4	5
We let you know we greatly appreciate your business:	1	2	3	4	5

If you were president of HMC Service Company what changes would you make to better improve the level of service to our customer, and why.

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### Weekly Sales Call Summary

	Customer Name	Contact	Phone	Notes/ Results/ Meetings	Date/ Time	Next Step
1						
2						
3						
4						
5						
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# Customer Survey

## QUALITY ASSURANCE PROGRAM

Customer Name:

Technician on Site:

Initial Greeting:

Hello, my name is \_\_\_\_\_.

I am with the \_\_\_\_\_ service department. I would like to conduct a very brief customer assurance survey.

The survey is only 12 questions and should only take a few minutes. May we please proceed?

I am calling as a follow-up to work recently performed by our service technician \_\_\_\_\_.

### Definition of Terms:

- 5 Outstanding – Performance of high caliber
- 4 Above Average – Performance at a fully satisfactory level
- 3 Average – Performance meets required elements of the job
- 2 Below average – Performance does not consistently meet acceptable; needs improvement
- 1 Unsatisfactory – Expectations are not being met

1. Did the Service Technician check in and out with you?

Yes      No      N/A  
Comments:

2. Did the Service Technician explain what repairs were performed and make any necessary recommendations before he/she left?

1      2      3      4      5  
Comments:

3. Are you happy with the service performed?

1      2      3      4      5  
Comments:

4. Overall performance of our staff and services delivered?

1      2      3      4      5  
Comments:

5. Professionalism and teamwork of our employees?

1      2      3      4      5  
Comments:

6. Technical Knowledge?

1      2      3      4      5  
Comments:

7. Response to emergencies, work changes or problems?

1      2      3      4      5  
Comments:

8. Information (service reports, proposals, accurate invoices, project reports)?

1      2      3      4      5  
Comments:

9. Overall value of company services?

1      2      3      4      5  
Comments:

10. Overall responsiveness to your needs?

1      2      3      4      5  
Comments:

11. Do you have any needs or concerns we should be aware of at this time?

Yes (Please describe)      No      N/A  
Comments:

12. Is there anything we can do to improve our service to you?

Yes (Please describe)      No      N/A  
Comments:

CLOSING: Thank you very much for your time. We appreciate your feedback.

Survey conducted by \_\_\_\_\_  
Signature

Approved/Reviewed by \_\_\_\_\_  
Signature

# Sales Prospecting – Finding leads for Maintenance Agreement Sales

## Suspect Resource Guide

- Contact by **market segment**, Property Management Firms, Industrial Parks, Banks, schools, retail chains, etc. Most sales managers recommend the shotgun approach as certain markets may be less affected by the economy, budget cycles, etc.
- Use “**Book of Lists**” offered by local Business Journals that itemize customers, by type, size, number of employees, market share, etc.
- Network through your **current relationships**, cross selling and up-selling, and asking for referrals.
- Pursue **industry associations** (BOMA, IFMA, IREM, etc.) These associations provide member lists.
- Identify **Manufacturer’s Directory** publications for customer prospect lists, example: Harris Info Source. These lists provide commercial and manufacturing facilities in the state by location, corporate officers, and volume in dollars, square footage, and number of employees.
- Create a link between **construction sales** and service sales. Pursue start-up and warranty needs that lead to PM agreements. Leads should go both ways!
- Sponsor **education classes**, lunch N learns.
- Start and participate in a **lead share group**. These are gaining popularity in most cities.
- **Equipment manufacturers**, become factory authorized to perform startup work as the preferred contractor.
- Find your “**lost client**” or **cancelled PM agreement** file and re-contact them. Perhaps the reason they left is no longer valid or the players have changed.
- **Black’s Guide**, for identifying Commercial office building information, lease rates, square footage, leasing agents, building age, and type of lease.
- **Contacts Influential**, another source for identifying all businesses by SIC code, type of business, ownership, size, etc.
- **Lead Generation Services**, many contractors use a telemarketing company to cold call and set up qualified appointments for their sales staff.
- **Field Technician Leads** are a great source to capture new customers.
- Asking your **current customers** for a referral is a great method to acquire new customers.
- Use the **internet**.....need I say more?