Sales New SOPs 8-17-21

Day & Nite/All Service

STANDARD OPERATING PROCEDURES

INDEX

- All Service Contract Sales REPRESENTATIVES (SCSR) report to the corporate office for process and procedural standards

STANDARD OPERATING PROCEDURE

Aa Standard Operating Procedure No.	Property
Original Date of Issue:	
Revision Date:	August 13, 2021
Revised by:	John Zhang
Approved by:	
Department:	**SALES**
Pages:	2-3

Aa Standard Operating Procedure No.	Property
Title	**DRESS CODE, SAFETY, LAPTOPS, MEETINGS**

PURPOSE:

The purpose of this procedure is to provide clear guidelines for professional conduct of the sales team. Successfully executing the complex service delivery chain begins with the sales force properly qualifying each customer, properly setting up new accounts up for immediate and lasting success. The purpose of this document is to institutionalize proven best new client acquisition, onboarding and comprehensive management practices.

RESPONSIBILTY:

Each SCSR is responsible for always conducting themselves commensurate with the job and the expectations described herein.

Frequency:

Daily

SOP – DRESS CODE, MEETINGS, LAPTOPS

Dress Code:

- It is expected that Service Contract Sales Representatives ("SCSRs") will dress appropriately for all business-related matters. Dress slacks and skirts with button-down or company logo golf shirts are acceptable. Jackets, ties and more formal wear is suggested for meetings where appropriate. Jeans, sneakers, and khakis are rarely acceptable in a business setting.

Safety:

- No SCSR should place herself/himself in any perilous or unsafe situation to complete their responsibilities. This includes but is not limited to; HVAC equipment listings and climbing customer supplied ladders or other potentially dangerous structures.

Company Cell Phones and Laptops:

- **Cell Phone:** In keeping with high-stakes b2b services in support of The Company's core hospitality customer base, your company provided business cell phone should continue to be monitored after business hours and on weekends. Using your cell phone to demonstrate leading technologies like our DNAS Lite mobile application is further illustrates our unique value proposition and is imperative.

- **Laptops:** Company laptops are to be carried with you at all times, so you can always perform an FM Anywhere Demo and have instant access to SamPro, DB Analytics, and the tools in the Sales Folder. Computer issues should be reported to IT with anything taking more than a few hours to resolve escalated to the Sales Supervisor so it can be documented.

Meetings:

- Your arrival at any meeting whether internal or external, in person or on a conference call should be 5 minutes ahead of the scheduled time, and fully prepared.
- **Office Time:** Although there are no longer set office days, you should create appropriately regimented schedules for collaboration both within the department, and interdepartmentally. Successfully onboarding any new account requires superb communication and coordination, all of it to be orchestrated by the SCSR, whether remotely or in person.
- **Sales Meeting:** Weekly Sales Meetings are scheduled every Thursday at 8:30am. The meeting will be held over a conference call line, as noted in the calendar invitation. Everyone is expected to be on the call every week by 8:25, so that we can begin promptly at 8:30. Absences from the call without approval from an SCSR's supervisor will be considered unexcused and will result in disciplinary action up to and including forfeiture of bonus pay or termination of your employment.
- **Everyone should sign up and create their own conference line for use with clients and colleagues at:**

> freeconferencecall.com

STANDARD OPERATING PROCEDURE

PURPOSE:

The purpose of this procedure is to provide instruction on the handling of Day & Nite work product, and completion of Sales Department Reports

RESPONSIBILTY:

The Salesperson is responsible for ensuring that these standards are strictly adhered to.

MATERIALS AND/OR EQUIPMENT:

Company Laptops

Balanced Scorecard/Pipeline Report

Leadtracker

Sales Folder

Cloud

Frequency:

Daily

SOP – COMPANY WORK PRODUCT AND REPORTING

Day & Nite Company Work Product:

- All proposals, pricing grids, introduction letters and any other Day & Nite company proprietary work product should be kept on Day & Nite laptops, with the information backed up daily to the Sales Folder and when applicable the cloud.

Sales Department Reports:

- **LeadTracker:** This Excel spreadsheet must be updated several times each week with the relevant information for every potential prospect (suspect) that you are targeting. All Cold Calls, Warm Leads, T&M and Warranty Opportunities, Networking or Trade Show Leads, must be entered into your lead tracker. The lead tracker is to be submitted to each SCSR's supervisor at the end of each month.
- **Balanced Scorecard/Pipeline Report:** This report that will be delivered each Thursday in the weekly sales meeting. Each week prior to the meeting SCSR will

thoroughly review and update all applicable fields of both tabs of this report. All formulas should work, and all data should be fresh and applicable. Balanced scorecard reporting must also be included every Tuesday at weekly finance meeting.

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Aa Standard Operating Procedure No.	Property
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Department:	**SALES**
Pages:	6-7
Title	**New Sales Opportunities**

PURPOSE:

The purpose of this procedure is to provide instruction on the time bound expectations for Sales Opportunities.

RESPONSIBILTY:

Each Sales Rep is responsible for strict adherence to these procedures

MATERIALS AND/OR EQUIPMENT:

- Time and Material Sheets
- Calendar
- Phone/Computer

Frequency:

Daily

SOP – TIME BOUND EXPECTATIONS FOR SALES OPPORTUNITIES

Time and Material Leads:

- Using SamPro, each SCSR will be responsible for running their market Time and Material Report every two weeks, about 1st and 15th of each Month. (NY Metro Reps will need to collaborate for NYC based Leads)
    - Once logged into SamPro, under “Reports” you will find “Crystal TM Report”
    - Running this report requires you to enter the time frame and the Market/Division.
    - The resulting report captures all Non-Contract work performed during the requested time period (T&M and Warranty).
    - SCSR should contact all T&M leads within 48 – 96 Business Hours.

Corporate/Warm/Cross Market Leads:

- Leads passed to any SCSR from Day & Nite Corporate represent critical opportunities to strike while the iron truly is HOT.
    - These leads must be contacted by phone or email (Preferably by Phone) within 2-4 hours from their receipt, and if necessary, require additional attempts until successful. Comprehensive account notes should be kept; proper documentation is a b2b services best practice.

> Warranty leads are particularly noteworthy and should be pursued as priorities, contacting each identified warranty customer within 18 hours of notification. Warranty applies to only recently purchased equipment, end-users invoking a warranty are often particularly frustrated by having to repair a new piece of equipment. When a Day & Nite/All Service/Performance Air Mechanical technician efficiently solves a warranty problem it is a uniquely ideal opportunity for an SCSR to convert that entity to a preventative maintenance agreement for all equipment.

Calling and Setting the Meeting with New Prospects (Stage 1):

- The Single Sales Objective for your call or email to a prospective customer should be to set up a meeting time with as many applicable buying influences as possible.
- This meeting should be schedule for as soon as possible, commonly 2-4 business days in lieu of extenuating circumstances.

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Aa Standard Operating Procedure No.	Property
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Department:	**SALES**
Pages:	8-10
Title	**Drafting and Delivering Proposals**

PURPOSE:

The purpose of this procedure is to provide instruction on the time bound expectations and processes for creating a Service Contract Proposal and delivering it to the prospective client.

RESPONSIBILTY:

Each SCSR is responsible for proposal creation and delivery

MATERIALS AND/OR EQUIPMENT:

- Credit Application
- Asset Listing (Provided by customer or acquired through site visit)
- Pricing grid for Market and Division
- Contract templates

Frequency:

Daily

SOP – DRAFTING AND DELIVERING SERVICE CONTRACT PROPOSALS

The Site Walk-Through:

- This is your initial meeting with your prospect, it's your opportunity to use SPIN and other techniques to get an understanding of why this customer will or will not purchase from you. During this initial meeting here are the MUSTS:
    - Deliver and discuss the Credit Application; given the Day & Nite family of companies stature, having an approved line of credit with the company is in every businesses best interests
    - Begin to build a matrix of all relevant buying influences
    - Take a full and accurate asset listing labeled by area of the facility, include items that are not to be covered so these can be noted on the agreement.
    - If a labor contract is being considered, carefully explain the 3 major exclusions, and the Pre-Contract Survey Process.
    - Communicate a clear timeline for next steps, including:
        - Proposal Delivery (All proposals should be delivered within a maximum of 48 – 72 hours)
        - Next meeting to review and discuss questions/concerns
        - Applicable Start Dates and the Implementation/On-Boarding Time Line
    - Perform an FM Anywhere Demonstration (when applicable)
    - Perform an DNS Lite Demonstration (when applicable)

Drafting the Contract Proposals:

- Each Service Contract proposal should be calculated based on the current market pricing grid.
    - Contracts can be increased within reason at the sole discretion of the SCSR working the opportunity, but and reduction of more than 5% off strict grid pricing must be approved by your supervisor.
    - It is the SCSR's sole responsibility to proofread every contract prior to delivery to the end user client to ensure accurate and professional work product. Any

SCSR who demonstrates inability to produce a consistent quality work product will be subject to disciplinary action and subject to disciplinary action up to and including forfeiture of bonus or termination of employment.

  - SCSR will build proposals from Contract Templates that will be provided to them, any material changes to the contract templates must be approved in writing by your supervisor and will serve as a one-time exception, to exist outside the templates.
  - Any SCSR may suggest edits or updates to one or all of the Contract Templates, and their suggestions will be review and a determination made by the ELT.

Service Contract Delivery Package:

- Your Service Contract Proposal(s) should be delivered within a maximum of 48-72 (unless in the case of larger facilities or formal RFP's with otherwise specified delivery expectations). The delivery package should contain:
  - All Service Contracts that are being proposed, reviewed for accuracy in language, pricing, and format.
  - Customer Introduction Letter to the organization (Welcome Letter)
  - A Digital Copy of the Credit Application or Account Set-up Form (Unless they have already completed one)
  - The FM Anywhere Screenshot Demonstration PowerPoint (in pdf).
  - The body of the email delivery should recap the information you gathered during the site visit (reason for them to buy) as well as broad strokes of what is attached for them to review.
  - Client Concierge and the General/Regional/Branch Manager, Business Manager, and appropriate service management for any units applicable should be actively included.

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Department:	**SALES**
Pages:	11-12
Title	**Implementation and On-Boarding of New Accounts**

PURPOSE:

The purpose of this procedure is to provide instruction on Implementation and Onboarding Process for Newly Signed Accounts.

RESPONSIBILTY:

Sales Reps

Client Concierge

Appropriate service management

MATERIALS AND/OR EQUIPMENT:

- Signed Agreement
- Completed Credit Application / Account Set-Up Form
- Complete and Accurate Start-Up Sheet

Frequency:

Monthly as Necessary

SOP – IMPLEMENTATION AND ONBOARDING FOR NEW ACCOUNTS

New Account Start Dates:

- For new acccount start-up of a Labor Contract for the following month, all paperwork should be submitted to Client Concierge complete and accurate no later than the 23rd of the prior month. Any Labor contracts submitted after the 24th of the prior month will be set to begin the 1st of the following month.

- For PM Only Contracts complete and accurate paperwork must be submitted by no later than the 30th of the applicable month.
- In special cases Client Concierge, General Manager, and Salesperson can discuss exceptions, a majority consensus must be agreed upon.

Submission of Documents to Client Concierge:

- Complete Implementation Documents Consists of:
  - Credit Application
    - For most customers there is a Standard Day & Nite Credit Application, all 3 pages must be complete for the Credit Department to review and process.
    - Qualified may, with Corporate Approval complete an abridged version of the Credit Application that captures relevant billing and account set-up information.
  - Complete and Accurate Start-Up Sheet
    - Special Pricing, Rates, Inclusions or Exclusions, and Hours of Operation should be noted.
    - Repeated submission of incomplete or inaccurate Start-Up Sheets will result in disciplinary action and potential bonus forfeiture.
  - Fully Signed Contract (All Signatures, Options Checked, Exclusions Initialed)

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Department:	**SALES**
Pages:	13-14
Title	**90 ACCOUNT MIGRATION TO CLIENT CONCIERGE**

PURPOSE:

The purpose of this procedure is to provide clear guidelines for professional conduct of the sales team, to execute complex service deliver chain begins with the sales force properly qualifying each customer, to set new accounts up for immediate and lasting success. The purpose of this document is to institutionalize proven best new Client acquisition, onboarding and comprehensive management practices.

RESPONSIBILTY:

Accountable party: SCSR

Responsible parties: Client Concierge, service management

MATERIALS AND/OR EQUIPMENT:

All mandatory and relevant new account set up information.

Frequency:

Comprehensive during the initial new contract customer 90 days

SOP – 90 DAY ACCOUNT MIGRATION TO CLIENT CONCIERGE

- Prior to delivering a contract, the SCSR will have already introduced all buying influences to appropriate service peers
- During the qualifying and selling process, the SCSR is expected to differentiate the company from competitors by highlighting the company's unique structure, with emphasis on Client Concierge and Strategy + Standards
- Upon receiving verbal commitment, the SCSR will introduce assigned Client Concierge. Designated Client Concierge representative will then onboard all paperwork, most notably distributing the Welcome Packet
- Once the account is set up in the system, the SCSR will then host an official kickoff meeting including all key buying influences, appropriate service management and Client Concierge
- SCSR will attend the initial PM and then follow back up with relevant buying influences within 24 hours completion of the scheduled maintenance. SCSR will

then report all customer feedback to appropriate service management and assigned Client Concierge rep

- SCSR will be made aware of first invoice distribution date and call the appropriate buying influence within 48 hours to confirm as promised and expected
- SCSR will host a monthly new contract customer conference call including all relevant buying influences, a Strategy + Standards delegate, appropriate service management and assigned Client Concierge rep at the end of month 1
- SCSR will report any account issues, warnings and risks to supervisor within 8 hours of receiving information
- SCSR will attend month 2 and 3 new contract customer conference calls, to be hosted and led by assigned Client Concierge rep as of month 2
- Failure to comply with these essential new account best practices will result in disciplinary action, up to and including forfeiture of bonus and/or termination of employment