

SOLAR AND HOME PERFORMANCE SALES
Portland Operations
March 2014

This employee is responsible for working with the client, from the initial client contact until the project's final payment is collected. He or she is responsible for packaging and selling projects that will meet the quality and profit standards established by Neil Kelly Company.

This employee is responsible for working in compliance with company-established standards for paperwork and processes, and customer, trade contractor, and vendor relationships. He or she is responsible for participating in specified company public relations and marketing efforts.

The Solar and HP Salesperson (HP Salesperson) will work directly under the supervision of the General Manager of Eugene Operations and also works with the General Manager of the Home Performance Division. Office hours are to be worked out with the General Manager, and will primarily be at the determination of the employee with the exception of staff meetings, trainings, marketing events, or showroom duty as assigned by the General Manager.

Primary Responsibilities

The primary functions of the position include, but are not limited to:

1. Interviewing the client in order to determine solar and home performance assessment needs in conjunction with the BPI Certified Auditor and by way of the testing process, remodeling or repair needs, budget, and financing needs. Assisting with the client's obtaining financing as necessary;
2. Estimating, presenting, and selling the project using other production staff members, and internal or external designers as needed;
3. Providing Neil Kelly Company with the signed contract, specifications, sketches and/or plans as necessary, cost sheet, selections, rescission papers, notice of right to lien, and all other pertinent project details;
4. Arranging and scheduling necessary meetings with the client;
5. Working with the Project Manager and assist by either actual site visits or consulting regularly with the Project Manager, project trade contractors and workers;
6. Coordinating the billing process (down payments, progress payments, and final billing) with the office staff, and reviewing all for accuracy;

7. Collecting the final check, reviewing the project with the client and asking for referrals;
8. Maintaining a company-provided presentation book, any necessary catalogs, and pricing information;
9. Attending regular general staff meetings and other technical or sales related meetings pertaining to Home Performance. Attending mandatory safety meetings and any other company mandated policy meetings;
10. Participating in training programs offered by the company to include: technical training related to Home Performance, use of pricing and ordering information, product information, computer training as required to perform the work assigned, sales training, and other classes as required by the management team;

A team structure including the client, HP Salesperson, HP Building Auditor, Project Manager, Carpenters, and other trades on the job is to be stressed, used, and capitalized upon whenever possible. Company management is to remain in a support capacity and to remain outside the project until and unless involvement is required by both the HP employee and the client.

Quality control, profit, service, and client satisfaction are the responsibility of the HP Salesperson throughout the life of the project warranty.

General Requirements

The HP Salesperson will have several years of experience in residential construction prior to this position.

The HP Salesperson will be expected to lift light materials. Regular travel between offices and jobsites is also required. He or she is expected to provide a valid driver's license and verifiable automobile insurance, as well as his or her own transportation to and from the office and during the work day in order to perform the required duties of this position. This person will be required to use a computer and calculator, write and speak English, use a telephone and other office equipment.

The HP Salesperson is expected to abide by the company safety policy, including Neil Kelly's Drug-Free Workplace Policy.

As an extension of our commitment to our community, the Neil Kelly Company Management Team has chosen to participate in an international environmental and economic sustainability movement through the framework of The Natural Step. It is expected that company employees will use this adopted philosophy as a guideline for making regular business decisions and participate in related Natural Step activities as directed by management.

The ability to work as a member of a team is a requirement for the HP Salesperson. Each company employee is assigned to a work group team that meets at least once a month to discuss company business. The HP Salesperson is expected to be a full participant on his or her team.

This position requires the employee to dress as a professional. Neil Kelly Company golf shirts, twill shirts, or similar generic shirts along with slacks, "Dockers" style pants, or skirts are acceptable. A tie is optional. Denim pants and sports shoes are not acceptable for sales staff unless required for attic or under house access. This person is expected to follow Neil Kelly's Safety Personal Protective Equipment policies as well.

The HP Salesperson must be effective in presenting ideas and recommendations – both orally and in writing; skill in analyzing and interpreting data and solving problems, and in exercising ingenuity and inventiveness in devising solutions; skill in mathematical computation; skill in making cost estimates for home performance, home repair, remodeling, and general residential construction work, and skill in working with clients in both a sales and service capacity.

This person must have the ability to deliver and produce projects within approved time schedules and budgets, and the ability to maintain effective working relationships with other employees, clients, trade contractors, vendors / dealers, and the general public.