



JOB DESCRIPTION ACCOUNT EXECUTIVE

A famous coach once said, “A winning attitude isn’t the most important thing, it’s the ONLY thing.” Likewise, we believe that Sales and the selling process is the highest priority activity in our business. You have a very important role with us.

The items below will describe the primary expectations the company has of you. There will be others from time to time; so you will need to be flexible in your approach to success.

I. Follow/implement our 9-step sales process: This is how we sell. Some of the 9 steps may not apply in all cases. The point of this process is that there *IS* a process. Use the steps that apply in each contact with a customer. The party responsible to complete the form, when needed, are shown.

[AE – Account Executive, OM – Office Manager, SM – Sales Mgr, ALL – All]

1. **Initial Call Sheet** – record the prospect’s vital statistics and interests [ALL]
2. **Measure Form** – to record the door/window dimensions and specs during a measure [ALL]
3. **Work Order (to measure)** – to dispatch someone else for a field measure appointment [OM]
4. **Door & Window Agreement** – Used for quotes and as a final sales Agreement. Always accompanied by the “Page Two” aka Important Information and Expectations Sheet. Use the latest versions. [AE]
5. **Thank You letter** – we send out a formal paper Thank You letter on our stationary for every time a Customer pays us money. It’s a simple, yet professional way we show our gratitude for their business. Your name will be listed at the bottom as the Account Executive. [OM]
6. **CAD drawing** – this is prepared for a customer after their deposit. PhotoShops may be ordered/prepared in some cases to assist in selling, generally 1 out of 10 cases. [AE]
7. **CAD Approval Form (CAF)** – Lists the customer’s choices of color, handle hardware, glass. [AE]
8. **Work Order (to install)** – once the doors/windows arrive from mfg., this is prepared for the installer. If there are special instructions the installer will need to know during the installation, let the Office Mgr know so that he/she can include it on the Installation Work Order. [OM]
9. **Lien Waiver** – following installation, the Customer signs this saying they are satisfied with their new door/windows and installation. If they have concerns, they can write them on the Lien Waiver and still sign it. It also releases the Customer from any duty (or liens) that an installation worker may have on the Customer’s house. It is intended to give the Customer a comfort level about the job completion. [INSTALLER]

II. Written Reports. The Company may request that drawings, project plans, sales progress reports and a final results report be provided on a periodic basis. A report may be due at the conclusion of a project or sales cycle and shall be submitted to the Company as required.

III. Inventions. Any and all inventions, discoveries, developments and innovations conceived by the Associate shall be the exclusive property of the Company; and the Associate hereby assigns all right, title, and interest in the same to the Company. Any and all inventions, discoveries, developments and innovations conceived by the Associate and utilized by him/her in rendering duties to the Company are hereby licensed to the Company for use in its operations and for an infinite duration. This license is non-exclusive, and may be assigned without the Associate's prior written approval by the Company to a wholly-owned subsidiary of the Company or other party at its sole discretion.

IV. Confidentiality, non-competition. The Associate acknowledges that during the engagement she will have access to and become acquainted with various trade secrets, inventions, innovations, business processes, information, records and specifications owned or licensed by the Company and/or used by the Company in connection with the operation of its business including, without limitation, the Company's business and product processes, methods, customer lists, accounts and procedures. The Associate agrees that s/he will not disclose any of the aforesaid, directly or indirectly, or use any of them in any manner, except as required in the course of business with the Company. All files, records, documents, blueprints, specifications, information, letters, notes, media lists, customer information, original artwork/creative, notebooks, and similar items relating to the business of the Company, whether prepared by the Associate or otherwise coming into his/her possession, whether prepared on company owned software or not, shall remain the exclusive property of the Company. Post-termination, the Associate shall not retain any copies of the foregoing, digital or paper version. Upon termination, or whenever requested by the Company, the Associate shall immediately deliver to the Company all such files, records, documents, specifications, information, and other items in his/her possession or under his/her control. The Associate further agrees that s/he will not disclose the terms of their employment to any person associated with the Company (employee, contractor or Associate) without the prior written consent of the Company and shall at all times preserve the confidential nature of his/her relationship to the Company and of the services hereunder.

The Associate agrees that sensitive company information will be shared with him/her in the course of the working relationship and that such information, records, business processes, and records require a substantial investment on the part of the Company to develop. As such, Associate agrees that during their tenure and for a period of 12 months following termination, Associate will not engage for services or for hire, with any company offering the manufacture, sale and/or installation of wrought iron entry doors, or steel windows and doors.

V. Conflicts of Interest; Non-hire Provision. During the term of employment, the Associate shall devote as much of her productive time, energy and abilities to the performance of her duties hereunder as is necessary to perform the required duties in a timely and productive manner. For a period of one year following any termination, the Associate shall not, directly or indirectly hire, solicit, or encourage to leave the Company's employment, any employee, consultant, or Associate of the Company or hire any such employee, consultant, or Associate who has left the Company's employment or contractual engagement within one year of such employment or engagement.