



## POSITION OPENING

**Position:** Account Sales Representative  
**Posting Date:** January 23, 2008  
**Department:** Direct Sales  
**Exempt:** Yes (Not eligible for overtime compensation)  
**Reports to:** Direct Sales Team Leader

### Summary

To provide *exceptional* customer service to internal and external customers by providing overall account management and developing long-term customer relationships with building owners and to increase system service, BAS, retrofit and financial based solution sales to building owners.

### Essential Job Functions:

- Provide responsive customer service. Answer customer calls and correspondence quickly and pleasantly. Communicate with customers in a friendly, professional, and patient manner.
- Perform all duties with the goal of building and maintaining long-term customer relationships.
- Immediately address any customer's concern. Request the involvement of other Company personnel as required. Notify Direct Sales Team Leader of any major concerns and the action taken to resolve it.
- Provide knowledge and consultation in the form of developing HVAC system related solutions for the customer's problems, including financial and performance-based considerations.
- Consistently ascertain customer needs and current market opportunities. Assemble and coordinate acquisition team as needed for customers and projects.
- Identify potential opportunities with existing and new customers.
- Convert leads into opportunities by following the sales process, identifying the required sales team members, making assignments, and communicating the next steps in the process.
- Develop multiple relationships with buying influences in the customer's organization, including financial and operational leaders, facility managers, project managers, project engineers, and purchasing agents.
- Develop and execute a strategic annual account business plan to identify the long term, mutual support requirements required to facilitate a strong, profitable and successful partnership on all platinum and gold accounts.
- Maintain an acceptable rate of business acquisition.
- Actively call on all assigned customers. Minimum of 12 yearly proactive calls if it is a platinum account, 6 for gold, 4 for silver and 3 for bronze.
- Provide quotes for system service agreements, service repairs, retrofit, BAS, IAQ, and energy solutions.
- Responsible for influencing owner's decisions on indirect projects.
- Renew all service contracts on assigned accounts.
- Grow service agreement base by increasing coverage on existing agreements and selling new agreements to customers.
- Gather or validate preliminary information and performs facility walkthrough to determine level of opportunity.
- Develop, evaluate, and discuss possible solutions with customers.
- Assist in estimating projects by analyzing and integrating equipment, controls, subcontractors, and services for each project.
- Validate the preliminary proposal with customer.
- Prepare and finalize preliminary/final proposal.
- Determine proposal prices and selling strategy.



- Prepare, negotiate, and review agreement/project scope.
- Present/review proposal and/or contract with all buying influences negotiating scope of agreement/project.
- Follow up with buying influences.
- Document status of all projects and opportunities in quote log/CRM.
- Prepare transition documents and communicate project readiness for assignment to operations team.
- Resolve major deviations from scope with team after validation.
- Follow up on all assigned leads and documents results in the appropriate tracking tool.
- Assist customers in answering technical questions on HVAC systems, Trane Products, and relevant industry issues.
- Flexibility to work outside normal work hours, as required

**Education & Experience:**

- Bachelor's degree (preferably in engineering or business) and three years experience in the HVAC industry or professional sales environment OR Associates degree (preferably in engineering or business) and five years experience the HVAC industry or professional sales environment.

**Special Skills:**

- Ability to communicate both written and orally.
- Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations.
- Ability to write reports, business correspondence, and procedure manuals.
- Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- Working knowledge of Windows, Microsoft Word and Excel.
- Excellent communication skills.
- Must be capable of working in a team environment.

**Physical Requirements:**

- Ability to pass drug screening.
- Mobility within the office.
- Ability to lift and carry 25 pounds.
- Willing to travel locally as required.
- Able to prove U.S. Employment eligibility.
- Valid Drivers license and excellent driving record required.
- Ability to communicate with others both written and orally.

**Consideration:**

Please email ([showitt@trane.com](mailto:showitt@trane.com)), fax (757-558-9899), or mail resume or application and salary requirements to Human Resources.

EOE/AA