



Sales Specialist Job Description

Employee Name:	Date:
	Nov 25, 2020
Reports to:	Works with:
Store Manager	Staff, Retail Customers, Contractors, Vendors

Company Mission:

To provide the best customer experience in the building supply industry.

Position Categories:

1. Customer Service & Sales
2. Administration
3. Finance
4. Communication
5. Team Support
6. Professional & Corporate Image

Position Description:

The Sales Specialist oversees the entire sales process and installation for assigned merchandise groups, including flooring, window and doors, plumbing, paint, cabinets or pole sheds to retail customers. This position provides superior customer service, knowledgeable advice, timely and accurate estimates and sales orders, merchandising, and inventory management, and organizes installation services.

“Leave an impression by helping others to succeed.”

Employee Personal Mission Statement:

Example: To provide superior customer service.

Job Responsibilities:

1. CUSTOMER SERVICE & SALES

Accountability: Oversees the entire sales process for M&Y's contractor and retail customers, generates new and repeat sales by providing superior customer service.

Performance Requirements	Success Indicators
<p>Daily Operations:</p> <ul style="list-style-type: none"> Adheres to Store Standards Manual and incorporates checklists into daily routine when required 	<ul style="list-style-type: none"> Checklists completed
<p>Estimation of Job Costs and Selling Packages:</p> <ul style="list-style-type: none"> Provides up-to-date and knowledgeable merchandise information and a high level of customer service Conducts accurate onsite measurements as required Provides detailed drawings in a timely manner that are designed to meet or exceed customer expectations Works with and has a thorough knowledge of appropriate software (i.e. professional estimating, Luxwood, Jeldwin/All Weather, Saberius and M&Y POS system) Provides accurate and timely quotes and estimate Ensures sales leads and opportunities are investigated and followed up in a timely manner Assists customers through their purchase process in a friendly and knowledgeable manner and provides timely and accurate sales transaction records Ensures sales orders have appropriate gross margin Processes and follows M&Y credit guidelines Ensures special order merchandise is ordered in timely manner using the correct ordering procedures Communicates with other staff members the appropriate resources required to ensure an adequate supply of merchandise is in stock Provides assistance to the sales desk as required Ensures customer complaints are handled in a timely and effective manner 	<ul style="list-style-type: none"> Customer, contractor, professional builder, vendor and staff satisfaction Adherence to policies & procedures Accuracy and detail of information gathered Accuracy of estimates generated Accuracy of sales transactions and purchase orders generated Margins are maintained Knowledge Timeliness
<p>Installation Management:</p> <ul style="list-style-type: none"> Develops strong relationships with installers and contractors as required and ensures Contractor Agreements are completed Supervises scheduling of installations Ensures installations meet customer requirements Works with supplier representatives regarding installation and warranty concerns Documents changes made with the customer by completing 1109 Change Order Form, getting required customer signatures and visiting job sites as required 	<ul style="list-style-type: none"> Customer, contractor, professional builder, vendor and staff satisfaction Accuracy and quality of work completed Accuracy of documentation for amendments Accuracy of warranty processed Knowledge Timeliness
<p>Safety and Security Management:</p> <ul style="list-style-type: none"> Operates equipment and performs all job tasks in a safe and appropriate manner and in adherence to M&Y Handbooks and Safety Policies and Procedures 	<ul style="list-style-type: none"> Adherence to Health and Safety Regulations Knowledge

<ul style="list-style-type: none"> • Wears proper PPE (Personal Protective Equipment) when required 	
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2. ADMINISTRATION

Accountability: Ensures administrative duties are completed and comply with company policies and procedures.

Performance Requirements	Success Indicators
<p>Daily Operations:</p> <ul style="list-style-type: none"> • Follows all company administrative requirements and policies • Completes training, develops and maintains a strong working knowledge of the bisTrack POS system as it relates to the position 	<ul style="list-style-type: none"> • Adherence to policies and procedures • Accuracy of work • Knowledge • Timeliness
<p>Merchandising Management:</p> <ul style="list-style-type: none"> • Creates an attractive department effectively merchandised, including signage • Ensures advertised merchandise are displayed and priced • Ensures display samples and brochures are current and merchandised 	<ul style="list-style-type: none"> • Visual appearance of the store • Public knowledge and awareness • Staff, customer, manager, and vendor feedback • Merchandise quality • Knowledge • Shelves are stocked at all times

3. FINANCE

Accountability: Ensures finance and inventory duties are completed and comply with company policies and procedures.

Performance Requirements	Success Indicators
<p>Daily Operations:</p> <ul style="list-style-type: none"> • Ensures proper invoicing procedures are followed • Reviews open orders and accounts receivable and initiates collection procedures when required • Works with Store Manager review margin and sales targets 	<ul style="list-style-type: none"> • Adherence to policies & procedures • Maintain acceptable KPI levels are defined by finance dept. • Knowledge • Margins are maintained
<p>Inventory Management:</p> <ul style="list-style-type: none"> • Orders inventory from approved suppliers • Monitors and controls inventory levels • Follows inventory ordering and receiving procedures • Assists in monitoring price levels and competitiveness • Ensure appropriate gross margins are monitored and maintained • Prepares and coordinates cycle and yearly inventory counts • Works with Accounts Payable Department to ensure accurate stock receipts • Assists in yearly inventory counts 	<ul style="list-style-type: none"> • Inventory maintenance including: <ul style="list-style-type: none"> • Minimum stock outs, • Inventory turns maintained • Margins maintained • Accuracy of units on hand. • Accuracy of purchase orders and stock receipts generated • Accuracy of pricing • Knowledge • Adherence to policies & procedures • Staff , vendor, manager and customer feedback • Merchandise quality • Shelves are stocked at all times

4. COMMUNICATION

Accountability: Ensures effective communication is provided to coworkers, customers and vendors.

Performance Requirements	Success Indicators
<ul style="list-style-type: none"> • Communicates with coworkers, customers and vendors by phone, email, and in person in a friendly and timely manner • Attends and participates in staff meetings and training sessions • Stays informed of the organization's plans and participate as applicable per company policies • Use of personal wireless device for the required use of prescribed apps during the work day to effectively communicate with coworkers • Takes initiative to read all bulletins 	<ul style="list-style-type: none"> • Customer, vendor, manager and staff feedback • Attendance at meetings • Knowledge

5. TEAM SUPPORT

Accountability: Works as a team member in the company and ensures no interruption in the duties of an absent employee.

Performance Requirements	Success Indicators
<ul style="list-style-type: none"> • Understands and respects staff roles to ensure a cohesive team inside the store and corporately • Maintains professional conduct and a positive attitude toward customers, suppliers, coworkers, and the company and its mission statement • Cross-trains with department personnel and other departments and works with other team members to build their understanding of roles, responsibilities, processes and product knowledge 	<ul style="list-style-type: none"> • Manager, customer, supplier and staff feedback • Adherence to standards • Knowledge • Work completed

6. PROFESSIONAL & CORPORATE IMAGE

Accountability: Maintains company standards and ensure professional conduct in uniform, appearance, and as a company representative.

Performance Requirements	Success Indicators
<ul style="list-style-type: none"> • Ensures appropriate uniform, grooming and professional appearance at all times • Demonstrates good judgment at all times • Maintains customer and company information confidentiality • Displays the ability to recognize and deal with priorities consistently • Ensures schedules and deadlines are met on time 	<ul style="list-style-type: none"> • Adherence to standards • Feedback/comments received • Degree of nonconformance • Visual
<ul style="list-style-type: none"> • Ensures participation in store community activities and events, and represents M&Y in a respectful and professional manner 	<ul style="list-style-type: none"> • Public awareness
<ul style="list-style-type: none"> • Develops and reviews personal plans to ensure goals support company and personal development goals 	<ul style="list-style-type: none"> • Initiative demonstrated • Development completed and recorded
<ul style="list-style-type: none"> • Follows policy and role responsibilities on a daily basis 	<ul style="list-style-type: none"> • Attendance • Reliability and punctuality • Knowledge • Adherence to policies and procedures
<ul style="list-style-type: none"> • Ensures all work stations and offices are clean, tidy, and organized at all times 	<ul style="list-style-type: none"> • Visual

<ul style="list-style-type: none"> Operates office equipment without supervision, including the photocopier, fax machine, scanner, postage machine, computer, printer, and facility fire alarm 	<ul style="list-style-type: none"> Knowledge
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Skill and Competency Requirements: (to be read in conjunction with the Company Competency Dictionary)

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| <p>Communication:</p> <ul style="list-style-type: none"> Listening Two-way feedback Written Verbal/oral <p>Problem Solving & Decision Making:</p> <ul style="list-style-type: none"> Problem solving Decisiveness & judgment <p>Customer Focus:</p> <ul style="list-style-type: none"> Prompt & courteous service Influence customer experience Improve customer service | <p>Initiative & Effort:</p> <ul style="list-style-type: none"> Plan of action Opportunity advantage <p>Planning & Organizing:</p> <ul style="list-style-type: none"> Task management <p>Technical, Professional Skill & Knowledge:</p> <ul style="list-style-type: none"> Basic Working understanding Comprehensive <p>Empowering Job Process:</p> <ul style="list-style-type: none"> Recognize <p>Demonstrating Business Skill:</p> <ul style="list-style-type: none"> Basic industry Promotion of products | <p>Interpersonal:</p> <ul style="list-style-type: none"> Sensitivity/diversity Manage relationships Manage self <p>Managing Change:</p> <ul style="list-style-type: none"> Task & priorities <p>Integrity & Trust:</p> <ul style="list-style-type: none"> Values Policies & regulations Relationships Positive environment <p>Financial Responsibility:</p> <ul style="list-style-type: none"> Cost aware Financially astute |
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Education and Training:

- Experience in the industry is a definite asset

Certifications

I have read the document and understand the duties assigned to my position.

Employee's Signature

Date

I certify that this is an accurate description of the responsibilities required of the position and that it forms the basis for the position's classification level and performance appraisal and that the employee has received a copy of this job description. Should responsibilities change according to work demands and the company structure, a revision to this document will be provided.

Manager's Signature

Date