

Procedures and Policy Manual for Sales Representatives

If you don't do it excellently, don't do it at all. Because if it's not excellent, it won't be profitable or fun, and if you're not in business for fun or profit, what the hell are you doing there?

Robert Townsend
American business writer
And former president,
Avis-Rent-A-Car, Inc.

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USING THIS MANUAL

This manual was prepared for the express use of sales representatives and associated staff. It is intended to aid reps and administrative personnel in understanding and adhering to the policy and procedural aspects of their jobs. Organized along key structures, the manual includes the accepted policies of First Choice Business Machines.

Each section includes copies of all forms that must accompany each sale. To aid in your understanding, we have also included completed forms so all sales representatives can easily understand what is expected of them.

To maintain new customer loyalty and protect your sale, it is imperative that all forms be completed correctly the first time. Each time you must revisit the customer to get additional information and obtain new signatures, you risk losing a sale that was once secure.

By “doing the right things right the first time”; that is, by following established procedures, sales reps can ultimately expect to save time that would be wasted redoing work that was incorrectly completed the first time. This saved time can be wisely reinvested in sales efforts.

All employees are encouraged to read and understand this manual.

All employees are expected to follow the procedures outlined herein.

VI. OPERATIONS/DELIVERIES

VI.A. OPERATIONS DEPARTMENT

VI.A.1. OPERATIONS DEPARTMENT COMMITMENT

It is the goal of the Operations Department to support the sales staff in all possible matters while maintaining the necessary control of inventory required to run a profitable company. Sales reps are encouraged to ask for whatever support is needed to take care of our customers.

VI.A.2. RESPONSIBILITIES

The operations/shipping and receiving manager is responsible for maintaining a list of current inventory, ordering any equipment into stock, and maintaining current information on availability of existing stock. This person manages the delivery crew, the installing technicians and key operations (key op) trainers.

The operations team is responsible for all movement of equipment anywhere in the four counties served by First Choice, as well as anywhere in the continental United States.

VI.A.3. REQUIRED DOCUMENTS

See Section II.A.

VI.B. DEMONSTRATION MACHINES (DEMOS)

VI.B.1 DEMO REQUESTS

A demo request should be submitted to the operations manager at least 48 hours prior to the required delivery date of a demo machine. Since most demos are fully configured, there is no need to list model numbers of accessories on the machine requisition form ([Exhibit 1](#)) unless there is a specific accessory your customer wants to see.

Demo requests are filled on a first-come-first-served basis and are dependent on machine availability.

If you want a specific machine delivered to your customer, list the serial number on the demo request form. If the operations manager doesn't call the sales rep to inform him or her otherwise, the requested machine will be delivered on the requested date.

It is important that all information requested on the demo request form is provided. Customers are always called before delivery is attempted. Zip codes are needed to route the delivery trucks. Other important information, such as stairs, is important to know before we attempt delivery.

VI.B.2. DEMO PERIOD

The demo period is normally three working days. It may be altered somewhat dependent on delivery and pick up schedules. If you want to extend the demo period for one day, fill out a demo extension form ([Exhibit 2](#)) for the operations manager. Your sales manager must authorize an extension of more than one day.

While the Operations Department will do everything possible to accommodate all circumstances, if the demo machine is needed at another account, it may be picked up regardless of the status of your sale.

VI.C. SOLD MACHINES

VI.C.1. SOLD MACHINE REQUESTS

A machine requisition form ([Exhibit 1](#)) should be issued to the Operations Department at the same time you turn in your paperwork to the order processor. (See [Section II.](#)) Be very specific about the models of accessories when filling out this form. Many machines take multiple finishers or other accessories.

If there is a pickup to be done at the time of delivery include the model and serial number of the trade equipment on your sold machine requisition form. This applies to trade-ins, machines going back to the leasing company or to the dump. The form shown as [Exhibit 3](#) must be completed and signed by the customer for machines going to the dump.

VI.C.2. SOLD DIGITAL EQUIPMENT/CONNECTIVITY

When selling digital equipment that requires connectivity — even if that connectivity isn't required at the time of delivery — you must include a copy of the site survey with your order. You must give a copy of the site survey to the dispatcher so he/she can schedule an appointment to connect the machines.

See [Section VII](#) for more instruction on connected machines.

VI.D. RENTALS/CONTINGENT DEALS

Follow the procedures for sold machines, which are described in V.C. above.

VI.E DELIVERIES AND PICKUPS

The Operations Department will not begin to process your request until they have received authorization from Order Processing. From that date, it will take approximately 48 hours until delivery.

The night before any equipment is scheduled to be delivered or picked up, the lead person in the warehouse will leave the sales rep a voice mail message with the specifics of the delivery. It is important that you check the voice mail system first thing every morning.

VI.E.1 DEMO DELIVERIES

Do not schedule demo machine deliveries on the last day of the month. Space on the delivery truck is reserved for equipment that has been sold. Demos scheduled for pick up on the last day of the month may be bumped to the next day depending on space availability.

VI.F. POWER REQUIREMENTS

Machine power requirements vary from different amperage to different voltage. (See [Exhibit 4](#) for details.) All equipment that is sold with a service contract is required to have a specially dedicated circuit to the copier. Installing technicians will not install a machine if the power requirements are not met.

No machine can be put on an extension cord unless that cord is a 12-gauge or more and is no longer than six feet. During a demo, the technicians are authorized to use an adapter (called a "pigtail") if the customer is trying a 20-amp machine, but only has a 15-amp receptacle. This pigtail will only be installed for the three-day demo period. Anything longer is considered a fire hazard.

If a customer has been notified that the power does not meet the machine requirements and they ask to proceed with installation anyway, they will be required to sign a "Power Problems" ([Exhibit 5](#)) agreement. This will put the liability on the customer.

VI.G. MACHINE MOVES

VI.G. MACHINE MOVE PRICING

In section 6 of the maintenance contract it states that if the equipment is moved from the location set forth in the agreement, First Choice, at its option, may terminate the agreement and/or an additional service charge may be assessed. The service charge is to cover the cost of the two delivery drivers and the technician required to complete the move. First Choice has no desire to make money on these moves, but does need to cover the cost of service that is not covered elsewhere.

There is a minimum charge of \$100 on all moves whether the machine is moved on premise or off site. The hard cost to First Choice is \$100 per stop, and it is necessary to recover that cost.

<u>Small box machines</u> Any tabletop model that does not necessitate removing of accessories during the move.	\$100
<u>Mid-size machines</u> Examples include the digital AR287 from Sharp, the digital 9935 from Savin or a tabletop model with accessories.	\$150
<u>Large machines</u> Examples include Sharp 2260, Savin 2070, Mita 5555 and all color machines	\$200

These prices include delivery personnel disconnecting the equipment at its present location, moving it to the new location and installing it there. See [Exhibit 6](#) for the Customer Move Form

VI.G.I. ADDITIONAL MOVE PRICES

The prices quoted above include moves of up to five miles. First Choice charges \$10 for each additional five miles.

If the proper power is not in place at the new location and a tech has to make a second trip to the customer premises to install the equipment, the charge to come back out will be half of the original move cost on top of the original cost.

If a move is completed at the time of delivery of a sold machine, one *in-house* move can be included at no cost to the customer.

VI.G.2. STAIRS

If there are stairs involved in the move, they must be wide enough for the First Choice crew to safely use the stair crawler. If the stairs are not wide enough, the customer must contract with an outside company to do the move.

\$20 will be charged for stairs at the pickup location and \$20 for stairs at the drop off location.

VI.H. HOT LIST

The operations manager releases a hot list each Monday. It lists any equipment that is on special or has special pricing attached. It is imperative that you call the Operations Manager before having your customer sign a purchase order for anything on this list because this equipment usually sells very quickly.

You will receive a copy of the hot list each Monday, either at the sales meeting at corporate or via interoffice mail.