

You can lead a horse to water... but you can't manage him to drink

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At some time in life, every HVAC company owner or manager with a full- or part-time sales force has wanted to be a fly...

A fly on the wall.

A fly on the wall of a prospect's living room as the comfort consultant went through their presentation without the boss being present to observe¹.

But you aren't a fly. So how are you going to know whether or not your comfort consultant is doing the job like you want it done? By good coaching.

It is difficult (even unwise) to "manage" a comfort consultant. You have to more or less coach them and give them considerable latitude. As management guru Tom Peters would say, you must master the "loose/tight" paradox.

This is because the average comfort consultant is psychologically a complex being and incompetence in properly channeling all that emotional energy can be as disastrous as awkwardness on a first date or clumsily kissing a cobra.

Consider this profile of a typical comfort

consultant. They are:

- usually **not detail-oriented** (so beware of requiring them to fill out complex forms as part of your monitoring system)
- **confident**— almost to the point of being arrogant
- usually **honest** and will not take kindly to your suggestion to compromise their values to make your company look better than it is
- **time conscious** (so don't waste that time with dumb meetings or reports)
- often **constructively critical** of management, but also often armed with proposed solutions that they want listened to seriously
- **creative** (so be careful of trying to make them fit a particular box)
- **competitive** (and hence not normally a good team player; the victory of a sale often means more psychologically than the money, the kill as thrilling as the pursuit, and they will react strongly against any move by you they perceive as a threat to their compensation plan)
- demanding of fair treat-

¹ Translation: interfere, intimidate, take over, etc.

ment by the company, including its full and solid support

- **self-motivated** (to learn, to grow, to act; beware of trying to “motivate” them — that door is locked from the inside)
- usually not “contracting” and “hands-on” oriented (have great technical skill and knowledge, but **disdain using tools**)
- usually **relate to the value** the customer receives, while management is often fixated on costs

Given this profile, what can you do to “manage” these creative mavericks?

Actually, quite a lot. Since they expect the company’s full support, provide them with the **tools they need** to make their presentations easier and more powerful, including (but not limited to):

- **presentation book** or a good company brochure
- simple but elegant **forms**
- **retail price pages** that are simple to use and have most of the pricing math done already
- **tools** (tape measure, flashlight, forms, multi-tip screwdriver, nut drivers, briefcase; optional items include volt-ohmmeter, , DVD player); in today’s selling environment, a laptop or notebook computer is not an option—it is a requirement!
- a “reasonable” **dress code** (as a rule, the salesman should dress one “level” above the customer’s

expectations)

Every true professional recognizes the need for constant training and improvement, so be sure to **provide ample quality training** on a variety of topics, ranging from technical skills (such as job engineering) and sales skills (like persuasion engineering) to communications skills. (But beware of herding them off to “motivational” lectures: most pros avoid the drivel that is pawned off by many as “motivational speaking.”)

And in the area of “management,” ponder what Richard Lippert, sales manager for an Arizona security alarm company, says:

“The credit for the eventual success or failure of any legitimate sales effort ultimately rests with management. The salesperson will act out what he is told, directly or indirectly, through the actions and/or inactions of management.”²

Some of the things you can do to provide action that effectively guides:

- Set **mutual goals** (annual, quarterly, monthly) for volume, gross profit, and other things (such as number of calls or closing rate). Then measure progress toward those goals regularly and frequently. (Most comfort consultants derive powerful motivation from smashing mutual goals.)
- Share your annual **business plan** so comfort consultants have a better grasp of their role in it.
- **Build a marketing machine** that permits your comfort consul-

² “The Foundations of Selling, Part 1,” *Security Sales*, August 1989

tants to respond with lightning speed to customer requests for job quotes. (Research shows that during breakdowns, less than one customer in six will get a second price if you respond within two hours of the call.)

- **Compensate** your comfort consultant on a plan that is not just volume driven. You might, for example consider the plans used by Tinker and Chance in the Lodestar article "Pricing For Commissions", or a hybrid plan, like this:

- * Base salary of \$16,000 per year
- * 50% of commission pool

earned on varying gross margin dollars. (like Chance's system)

- * 30% of commission pool earned on service agreement sales
- * 20% paid on closing rate above 60% with a minimum of 10 calls a week

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