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Procedure Manual Excerpt :*Greg Unseth Painting and Exteriors*

(Sample from the Canvass Manager Operations Manual)

Filing and Organization - The Nightly Quota Board

Greg Unseth Painting and Windows – Canvass Marketing Operations Manual

Every office must have a nightly quota board, where the Canvassers are able to watch and keep track of their individual results, the results of their team, the quotas, estimates (commissions), and contests. Not only does such a board keep them motivated and involved more in the company, it also serves as a backup to the Canvass Manager's reports, and is a quick way for upper management to assess the status of an office's Canvassing Crew.

A quota board, made from a dry-erase board, a permanent marker, and a straight edge, should ideally be very large, since greater size will allow space for more Canvassers, and more total days recorded. You should shoot for being able to keep track of at least three weeks, always rotating through the board and erasing the oldest week's data at the end of the current week.

Rows will be split up between:

- Date stuff (at the very top)
 - o Top row is 'Week of _____', and an area to keep track of any weekly bonuses.
 - o Next are the days of the week. Don't forget the days where the salesman still work, even though the Canvassers are off—you'll still need to keep track of those estimates.
- First Team
 - o Six rows for team member names and data, with the Team Leader at the top.
 - o Team 1 Totals
- Second Team
 - o Six rows for team member names and data, with the Team Leader at the top.
 - o Team 2 Totals
- Other Canvassers (if space on the board)
 - o However many extra spaces you can create for extra teams, special teams, and the Canvass Manager.
- The Final Row is for Complete Totals between all Teams.

Columns will be split up between:

- The First Column is for
 - o Canvasser Names
 - o Data designations (i.e.-"Team 1 Totals:", etc.)
- Up at the very top, you'll create a large column for each week you're able to fit on the board. Ideally, try to put at least three weeks worth of space on the board, so Canvassers can compare their results week by week and viewers can get a broader view on the Canvassing Crew's results.
- Each weekly column will be split up into:
 - o The six days of the week the company works (excluding Sunday), starting on Thursday (the beginning of the pay week) and ending on Wednesday
 - o Aslightly larger column for weekly totals.

Make sure the rows (starting with Canvasser results) are tall enough to squeeze in nightly set appointments (leads) at the top, a good amount of space for keeping track of estimates at the bottom, and room in the middle for writing in quotas, bonus stuff, and other notes ("Rain", "Doc Appt", etc.).

Columns don't need very much width, but keep in mind that you'll need plenty of space for Canvasser names, and enough width on the daily data areas to write in all the different kind of commissions.

As you can see in the image, this (old) dry erase board has three week columns, which should be the minimum you'll want for a serious Canvassing Crew. You can also note that the first week column is blank, because at the time of this photo, we just finished the last week on the board, and it was time to start a new week. At such a time, erase the oldest week, rotating through the week columns as time passes.

When creating the board, you'll have to (very carefully) draft all of your rows and columns on scratch paper, measure the dry erase board, and calculate the math for distances between rows and columns to fit everything you're planning. This was my first board, where only a slight miscalculation left me a row short. After applying permanent marker, I was one row short of having a 'Complete Totals' row. That's why 'Team 2 Totals' has been shoved up into a Canvasser space and the original 'Team 2 Totals' was re-designated as 'Complete Totals'.

Every night when the Canvassers return from the field, each team's Leader should record the team's results in that day's column. Write in the number of leads gathered for each Canvasser in the top-center of the cell. The Team Leader should then proceed to add up the totals for the night into the team's 'Total' cell for the day (again, top-center).

As Canvass Manager, whenever you gather estimates from the appointment books for payroll, you'll also write them into daily cells for the Canvassers, so they as individuals can see the commissions they earned, as well as those of their team-mates, for motivation and encouraging competition.

When recording estimates on the dry-erase board, write them in at the bottom of each daily cell. The board in the picture is too small for recording Paint, Windows, Fences, and Decks, so on this board, Paints and Fences are written in as 'P's, and Windows and Decks are written in as 'W's (since the pairings are worth the same commission, \$15 and \$20 respectively). If your board is large enough where the daily cells allows more expanded and accurate results (P's, W's, F's, and D's), go for it. On the board in the picture, however, you might see a day where a daily cell for a particular Canvasser says at the bottom, "3P 2W". This means that on that day, the Canvasser earned commission for 3 Paint (and/or Fence) estimates and 2 Window (and/or Deck) estimates run. Estimates recorded like this can be totaled up at the end of the week (the last column) for showing total commissions for the week, also for consideration of Bonuses.

At the end of the week, a team's Leader should add up each day's leads for each Canvasser into the last (Total) column. In the middle-right of individual Weekly Total cells, the Team Leader should write in that Canvasser's leads-per-hour (Quota). If under Quota, write the leads-per-hour in RED.

If a bonus for the week is in place, the individual Weekly Total cell is a good place to cram in bonus results after adding up total estimates.

Also, if a Canvasser missed Quota for the week, and his estimates are determined to be docked as a result, write in the total estimates in RED, along with the monetary amount LOST because of missing Quota. This will point out the missed income and the result of missing Quota obvious to everyone, and pressure the individual Canvasser to perform better then next week because of his loss and the peer pressure of display.

If you have a little extra space in your daily columns, you can use that for relevant notes about the night. Such as, if excess rain caused a lot of down-time, write "Rain" under each Canvasser's leads for the day and the team's daily total, to help explain at a glance why the numbers were down for the day.

Splitting the Leads and More Board Notes:

Later in the year (once approaching 'Window Season'), you may consider splitting the data of the nightly quota board into 'Windows' and 'non-Windows'. Depending on the direction of your Canvass Marketing Director, you may simply have your board split up in this more complicated manner year-round.

In each night's individual cell (specific to each Canvasser), instead of simply writing how many leads that Canvasser gathered, write in a 'slash' (/) in the middle, and have the Team Leaders record Paint leads (non-Windows) on the left side, and Window leads on the right. Mark these 'slashes' into each cell for each Canvasser's night, and each individual Canvasser's weekly totals. Make sure, however, not to split up the lead counts in totals for the night (team totals, complete nightly total, and complete total for the week), which will make it easier for management to check in on the Canvassing Crew's efforts at a glance.

Splitting up Window leads from non-Window leads will also require a more advanced 'Team Leader Ground Hours Form', which will enable the Team Leader to keep track of each Canvassers' leads in a separate lead-type fashion.

Keeping track of Window leads separate from non-Window leads works well in the winter, when Window leads offer extra commissions based on closed sales and Window leads affect Canvasser quotas differently than non-window leads. Seeing Paint vs. Windows in their individual results also helps Canvassers see more of their personal results and inspires competition.

The Commission Board:

On a separate board, if your office is keeping track of any commissions for Canvassers based on closed sales, create a simple chart with each Canvasser's name and a column for each week showing how much commission they earned that week. Write the commissions earned in with dry-erase markers, and update whenever a new commission is finalized.