

CUSTOM ONE EXTERIORS

Job Description – Exterior Sales Consultant

Position: Exterior Sales Consultant

Classification: Exempt

Reports to: General Manager

Summary of Position:

- The Exterior Sales Consultant is responsible for generating and driving sales growth while ensuring successful project completion of all exterior projects. This role combines sales expertise with project management oversight, working closely with a dedicated Project Coordinator to deliver exceptional customer experiences. This role requires a consultative approach to understand customer needs, present compelling product solutions, and build long-term relationships to ensure the continued quality and growth of Custom One Exteriors

General Responsibilities

- Drive sales to meet and exceed sales targets set by General Manager
- Conduct daily follow-up on outstanding quotes
- Process quotes and sales paperwork including working with customer insurance company when necessary
- Work with our professional network of trade partners on client selections and availability for all product exterior related including but not limited to roofing, siding, doors, windows and gutters.
- Receive training and develop sales skills and product knowledge through internal resources, vendor programs in person or online
- Work to create partnerships within the industry to help generate lead flow
- With the assistance of a dedicated Project Coordinator, lead project oversight to ensure smooth project execution from contract to completion

Process

- Assist prospective clients with home review, plan development, scope, and options selections.
- Meet with clients to finalize and document all selections including roofing, siding, doors, windows and gutters.
- Consolidate design, scope, selections, and pricing in a contract to present to clients
- Work with client during construction to initiate change orders.
- Work with project coordinator to assist in the flow of information from trade partners and client
- Complete client selection paperwork accurately and by deadlines
- Submit paperwork to client for final authorization through Salesforce and authorization process to internal team members and trade partners
- Prepare and double-check final document package for accuracy and submit to construction team
- Provide status updates to team including General Manager
- Grow knowledge through project visits, attend education sessions/training from trade partners, as well as internal company training.
- Attend product knowledge meetings monthly, stay current on product trends (vendor training, online research)

Qualifications

- Trade school or undergraduate programs preferred
- Existing upper-end sales and service experience
- Experience or knowledge (and willingness to learn) Exterior Sales (windows, doors, roofing, siding +) in both Residential and Commercial applications
- Flexible work hours are considered, and occasional weekend or evening hours expected
- Outgoing, skilled at developing prospects, and exceeding client expectations a must
- Ability to effectively communicate, experience with Sales Force (or similar CRM's) and proficient in developing Word and Excel documents

Conclusion

This job description is intended to convey information essential to understanding the scope of the job and the general nature and level of work performed by job holder within this job. However, this job description is not intended to be an exhaustive list of qualifications, skills, efforts, duties, responsibilities or working conditions associated with the position