

EMPOWER your customers to say:

**YES!**



# Go Greener Academy

Sales Training & Resources  
for NEIF-Approved Contractors

## How to Set Smart and Attainable Goals for Your Sales Team!

Go Greener Academy  
01/17/2023

Presented by:  
**Ed Matos**  
VP-Business Development

# From NEIF- The National Leader in Energy Efficiency Financing

- The NEIF Seal of Approval for Contractors means:
- **Access to all NEIF's financing programs**
  - Special **utility and government programs** for targeted improvements
  - **No Contractor-Fee** EnergyPlus financing for all types of home improvements
  - Small Business and **Commercial Financing** and **Rebate Advance** Funding
- **Reputational enhancement** for your company by association with the nation's only Certified B-Corp, US DOE Home Improvement Expert and FORTIFIED partner lender
- **Benefit from NEIF's Alliances** with green banks, utilities, manufacturers & associations for special insights and programs
- **Expert sales training, sales tools and support** for your team to increase closing rates
- **Marketing and branding programs** to help you differentiate your company, broaden your market and promote fair, trusted affordable financing options to your customer



Go Greener.  
Affordably.



# Today's Session



- Best practices for setting quarterly and yearly goals
- Strategies to motivate and keep your sales team engaged
- Innovative commission and bonus structures to help your team meet their goals



*"If you don't know where you are going,  
you'll end up someplace else."*

*-Yogi Berra*



# SMART Goals



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# S

# M

# A

# R

# T



Specific



Measureable



Attainable



Realistic



Timely



## Your goal setting process must be rooted in DATA

- Need Prior Year's Monthly and Quarterly Sales
- Accurate Close Ratios
- Current Pipeline Numbers

# Strategy Goal Setting



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**Must Do. Should Do. Could Do.**

# Example Goal Set



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- Do this with your Salespeople, set your GOAL as a TEAM!

**Must Do.** 4.2M

**Should Do.** 4.9M

**Could Do.** 5.5M



# Commission vs Incentive



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## COMMISSION

*Commission is an income payment based on a percentage of a product or service sold – usually paid in cash.*



## INCENTIVES

*Incentives are the use of rewards, recognition, or discounts to motivate someone to achieve a specific outcome.*



**\*BOTH ARE IMPORTANT\***

# Commission



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## Solid Base Salary with Tiered Commission = Bigger Upside!



# Incentives...BE CREATIVE



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**CASH 1**  
  
Cash is king

**2 OPPORTUNITIES TO GROW**  
Both professionally & personally  


**3 ACTIVITY AWARDS**  
A vacation can be a memorable award  


**4 GIFT CARDS**  
A prize that gives some flexibility  


**5 EXTRA PAID TIME OFF**  
Encourage a work-life balance  


**6 LET THEM CHOOSE!**  
Have them visualize the prize that will motivate them  


**7 TEAM MEALS**  
A prize that gets celebrated with colleagues  


**8 THE BEST PARKING SPOT**  
Prestige and convenience  


**9 WALL OF FAME**  
Some people love being publicly recognized  


## Bottom Line...



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- Invest Time in your Team
- Create Buy-In
- Have Fun
- Be Excited
- **Follow Through!**

**SALES**

# Training & Program Contacts at NEIF



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- NEIF specializes in working with contractors to integrate fair, transparent financing into their sales process to help increase the affordability of energy efficient upgrades
- We offer on-site and on-line training for contractors and their sales teams



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