



Delicate Balance: Keep sales, ops and contracts in sync

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Introductions

- Courtney Gordon - Sales Manager
- Tom Marsan - General Manager
- Faith Anderson - Sales Support Specialist



Internal Communication Best Practices



Who here has ever had to explain to an angry client why something didn't get done—only to realize your operations team never even got the right info?

- Use of CRM Systems, kick off meetings, shared calendars
- Ensuring field staff and dispatchers understand what was sold

Writing Contracts that Reflect Reality

How many of you have ever had a contract that looked great on paper, but completely fell apart once the snow hit?

- Craft service level agreements that match operational capacity
- Key clauses in every snow contract
 - Avoid misunderstandings

The Sales/Operations Disconnect

Ever feel like sales and operations are sometimes playing on two different teams even though you're wearing the same company logo?

- How overselling or underscoring contracts strains field teams
- True Story from the Panel

When It All Goes Wrong

The storm gets blamed, but the real damage starts long before the first flake falls—when sales, ops, and admin aren't on the same page.

- Real-life misalignment horror stories
 - What changed?
 - How is it handled?

Building a Repeatable Process

In an industry where every storm is unpredictable, the only way to deliver consistent results is by building a process that isn't.

- Training sales on operational limits
- Using templates/checklists
- Aligning incentives so everyone wins when the job goes smoothly

Q & A

- What's one process or checklist you've implemented that has significantly improved alignment between departments?
- What warning signs do you look for that indicate a contract is headed for trouble?
- What does a successful pre-season kickoff meeting look like at your company? Who's in the room, and what gets discussed?
- What advice would you give to a sales rep who's trying to balance winning the bid with setting realistic expectations for operations?

Post-Panel Survey

Thank you for your
attendance and attention!

Take the survey to share your
thoughts.

