

Standard Operating Procedure Schedule Controls Process

Function	Department	Revision #	Implementation Date
Communication	All	ORIGINAL	8/3/21

Purpose

This Standard Operating Procedure (SOP) is designed to outline the process of tagging and communication touchpoints throughout the sales process. Following protocols in the tagging and communication process will minimize labor efficiencies, maximize time management, and save on indirect costs.

Scope

This SOP applies to all company's employees.

Procedures

Step 1: Leads to Prospects...

1. Tag salesperson when they are assigned a new lead. Admin Asst will tag salesman for updates on follow up with customers as needed. Salesperson must contact lead within six hours of tag or forfeit the lead.
2. Tag Admin Asst when customer appointment is set so she can update the system and turn the lead into a prospect.
3. If salesperson cannot take the lead, immediately tag the Admin Asst so we can reassign.

Step 2: Prospects to Contracts...

1. Sales Questions
 - a. Tag Sales Director if there is any issue with a lead, need technical help, or have pricing questions before reaching out anywhere else. Make sure photos and measurements in the system before tagging.
 - b. If Sales Director is unavailable within reasonable time frame, tag General Manager for all these questions. Again, make sure all data is in CRM before tagging.
2. Insurance
 - a. Tag the System Admin for all insurance and cash bid questions before submitting contract.

Step 3: Production and Closeout

1. Production and Repairs
 - a. Tag [REDACTED] and [REDACTED] when turning in your contract for a new roof replacement, repairs, warranty, questions on material availability, and all scheduling concerns.

2. Project Management.
 - a. Tag Lead Project Manager in jobs ready for QC – he will assign a PM to project.
 - b. Tag Lead Project Manager in all customer complaints so that he can assign a PM or check it out for himself. Assigned PM must contact the client within four hours of tag/assignment.
3. Supplements
 - a. Tag System Admin for all supplement questions or concerns. Make sure all photos in the system before tagging.

Step 4: General Office

1. Tag HR Supervisor on all legal or compliance issues as soon as they arise! Don't let things snowball into bigger issues!
2. Tag HR Supervisor on all pay-related questions, HR issues, or new employee onboarding concerns.
3. Tag the Marketing Specialist for any marketing materials, business cards, or strategy and promotional training.

Communication Flow

1. Salesperson is the lead point of contact for client until signed contract is achieved.
2. Once contract is signed, the assigned Project Manager becomes the lead point of contact for the client.
3. Use the communication chain. Do not skip over a link in the communication chain.
4. If you must communicate with the client outside of the lead POC ensure to tag this individual in ALL communication and talking points discussed so there is no disconnect.
5. Before asking for input or technical help, ensure all photos and aerial measurements have been uploaded into CRM.