

Cash Job Workflow

- Lead Received
 - o Appointment Set → Email/Text thank you message to customer with Rep. Photo
- Inspection
 - o Checklist for sales rep to complete
- Follow up (5)
 - o 1
 - o 2
 - o 3
 - o 4
 - o 5
- Estimate (not always after the follow-ups, could be before or during) → Estimate/Proposal given to customer
- Contract Signed
 - o Deposit Collected
- Production Packet Complete → notification of receipt to customer
 - o Checklist for sales rep to complete
- Approved
- Order Material
- Schedule Material Drop → Notify customer
- Schedule Job - Schedule Extra Trades
- Job Build Pending (final schedule verified) → Notify customer - Job Build Date Scheduled
- Quality control Complete → QC and Returns
- Customer follow up (satisfaction, referrals, reviews)
- Invoice Customer
 - o Steps involved
- Close Out
 - o Warranty provided
 - o Cert of Completion

Insurance Workflow

- Lead Received
 - Appointment Set → Email/Text thank you message to customer with Rep. Photo
- Inspection
- Service Agreement Signed
- Claim Filed
- Follow up
 - o 1
 - o 2
 - o 3
 - o 4
 - o 5
- Adjuster Inspection/Meeting
- Claim Approved / Not Approved
- Contract Signed
 - o Deductible Collected
 - o ACV Collected
- Production Packet Complete → notification of receipt to customer
 - o Checklist for sales rep to complete
- Supplement #1 Filed
- Approved
- Order Material
- Schedule Material Drop → Notify customer
- Schedule Job
- Schedule Extra Trades
- Job Build Pending (final schedule verified) → Notify customer
- Job Build
- QC and Returns
- Supplement #2 Filed
- Customer follow up (satisfaction, referrals, reviews)
- Invoice Customer and Insurance Company
 - o Steps involved
- Close Out
 - o Warranty provided
 - o Cert of Completion