



MEMO

From Joel Ward
Dir. Business Development

Sales Process Documents April 30, 2020

TO: [REDACTED]
RE: Prospective Salesforce CRM Development

Following are the documents used in our sales process that were sent over to you yesterday. I have put them in general order of use or flow. I am using the file names to make it easier to match up with the PDF files sent to you.

1. General Lead Call
2. Real Estate Lead Call
3. Updated Price List (used by sales rep as a guide when working up a proposal/contract.
4. Roofing Checklist for Estimators (sales reps suppose to commit to memory)
5. Re-Roof Take Off Form (sales reps fill out during roof inspection and use when working up a proposal/contract and eventually order forms)
6. Realtor Inspection Report (used when its a real estate client's prospect)
7. Contract Forms based on type of job. (SmartDoc simply means these are the PDF files created to go into Accylynx SmartDocs feature. These are listed in order of frequency of use:
 - a. SmartDoc Insurance Contract
 - b. SmartDoc Cash Contract
 - c. SmartDoc Repair Contract
 - d. SmartDoc Generic Contract
 - e. SmartDoc Gutter Contract
 - f. SmartDoc Addendum
 - g. Commercial Inspection Contracts
 - h. (There are other commercial contracts we need to create. For now we use generic.)
8. Attached to the proposal/contract are other documents that are samples to show the customer things like our insurance coverage, our social media reviews, a sample warranty certificate that they will get at the end of the job, and a doc explaining the process of the job, what they can expect and what their responsibility is.
9. In some cases there are supplemental docs the rep needs to fill out to make sure the job is done correctly, such as:
 - a. Dome Skylight Replacement Checklist
 - b. Full Skylight Replacement Checklist
10. Job Instructions at a Glance (reps fill this out for approval process, production and accounting use. Much is duplicated from the re-roof take off form.)
11. Approval Checklist

12. (After approval, the Production Manager takes the order forms filled out by the reps and places orders and schedules the job. (materials and labor forms were not sent as they are completely electronic in Acculynx)
13. Conditional Waiver and Release of Lien
14. Quality Control Checklist
15. Job Complete (Certificate of Completion)

The spreadsheet files sent over may require us to discuss on the phone and do a walk through:

Lead Allocation

CablesRoofingSalesCalculator

When we discussed the metrics of lead allocation, I forgot to include information about another criteria of assigning leads that the owner, [REDACTED], would love to have if possible. He would like to be able to assign based on geography since we are so spread out. Often, it's important to get a sales rep out to a lead very quickly. In those cases we need to know who is the closest. Almost like emergency responders being sent to a scene from dispatch. The idea is the reps have a geo-location feature on their phones turned on while they are working. Our system would know where they are when a lead comes in from a particular location and that becomes part of the decision hierarchy of assigning the lead.

Thanks for your interest in our project.

Joel

