A-Z of Operations

Marketing
- 10 x 10

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Inbound phone call
- Phone script
- Add to Daily Sale Sheet

→ **Small Jobs**

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For jobs over $100,000
- Send Questionnaire
- Send Welcome Pack

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Follow up phone call if questionnaire not returned

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Follow up phone call by Ross to discuss questionnaire
- Book site visit or
- Not qualify phone script

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Ross site visit once questionnaire returned

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Second site visit if needed

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Quote
- Preliminary Schedule
- Add to quote track list

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Follow up phone call
after 1 week
- Plan and record next follow up date

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Follow up phone call

→ **Close file**
- Update quotes list

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Quote approved
- Send welcome email
- Send payment terms
- Quote to Job form
- Update quote list
- Sign contract

→ **Recruit**

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Induct

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Workers schedule updated

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Phone contact re start date
- Who Plumbers will be
- Access

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Order materials

→ **Start job**

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Pay Bills
- Follow Creditors process

Follow up phone call
2 days after job start and weekly thereafter
- Customer satisfaction
- Decisions to be made
- Problems found
- Changes to quoted work

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Interim invoices → **Unpaid invoices**
- Follow receivables process

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Complete job

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Final invoice
-Questionnaire

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Back costing

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Thank you email
- Details on maintenance & WOF
-Referral incentive

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Newsletter