**Key Performance Indicators – Estimator.**

Name: …………………....…... Week Beginning: ……..…………………… Reporting To: …………….…..……………

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| **Key Performance Indicators.** | | |
| **1:** Conversion rate at 70% or above. | **2:** All quotes completed within 4 days of site  visit / enquiry. | **3:** Value of forward work booked greater than $100,000 |

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| **Key Performance Activities.** | **Week 1.** | **Week 2.** | | **Week 3.** | **Week 4.** | | **Week 5.** | **Points** (Y=1, N=0) |
| Pricing checklist completed for all jobs. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| Pricing templates added or adjusted for new jobs done. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| Jobs priced for target gross profit margin. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| Triage call completed for all relevant jobs. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| Onsite sales scripts followed for each sales appointment. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| All quotes followed up the day after they are sent (using quote follow up script). | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| Check supplier prices match prices in pricing software. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| Complete handover checklist with Operations Manager. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| Complete your 20-minute coaching format prior to meeting with Managing Director. | Y / N | Y / N | | Y / N | Y / N | | Y / N |  |
| **Notes:** ……………………………………………………………………………………………………………………..  ……………………………………………………………………………………………………………………………………  …………………………………………………………………………………………………………………………………… | | | *Incentive Program.*  Under 7 = $0  Under 8 = $30  8 plus = $100 | | | **Total Points:** | |  |
| **Score:** = Total points ÷ No. of weeks in month (out of 9). | |  |