7 OF 7 BEST
Business and Life Strategies, LLC

THE SNOW MILLIONAIRE MASTERY *Intensive*

SUPPORT SYSTEM MODULE

I. The Contract Packet

The Contract Packet contains all the information about what was sold to a client. It is gathered by the Sales Department and then given to both the Production and Accounting Departments.

The contract signed by a client and the work that went into the proposal are both used together to form a contract packet.

The contract packet has the estimate information: the labor, the materials, the equipment to be used, and any extras the project needs to be completed. In addition, all the contact information for the site as well as billing will be added to the contract packet.

The Sales Department creates the Contract Packet from all the information gathered during the sales process: the correspondence data and the estimate / proposal work.

The Production Department needs the information about the labor, materials, the equipment, and the extras. Production needs the hours and the amounts but not the dollar amounts. They need all the information that helps them do the right work at the right time… nothing more.

The one result, the most important result of the Contract Packet is each department has the right information to do their work.

Now each department does it job more effectively, quicker, and with less fumbling looking for the information.

The systems and templates are as follows:

1. The Client Profile Physical Copy
2. The Client Profile Computer Copy
3. Template – Client Profile Checklist (see template attachment 2a)
4. Template – Client Profile Contact Sheet (see template attachment 2b)

1. CLIENT PROFILE Physical Copy

Each potential client that becomes a client will have a physical copy. Buy a 6 part folder for this information. Also buy an expandable holder folder for the details of the invoices.

Both the Client Profile Physical and Computer copies will depend on the size of your business. For example if the Sales, Production and Accounting Departments involve the same people wearing different hats then you only need one Contract Packet with all the information.

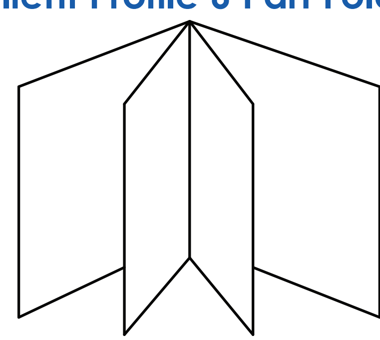
However if you have separate Sales, Production and Accounting Departments then you need to have different Contract Packets for each.

The Sales Department looks after potential clients and puts the initial Contract Packet together.

When the client is signed then the Production Department needs all the information relating to production so they can do their jobs. For example they don't need to know how much you're billing but they do need to know how many hours of work were contracted.

And the Accounting Department obviously needs to know the financial side but has no need for site photos or maps.
The result of the Client Profile Physical Copy is to have all the needed information on a client in ONE place that is easy to access for the Accounting and for the Production Departments.

Client Profile 6 Part Folder



A B C D E F

For Accounting:

A) Contact Sheet, Office Information
B) Signed Contract
C) Estimate Paperwork
D) Correspondence
E) Invoices Open
F) Invoices Closed

For Production, if necessary:

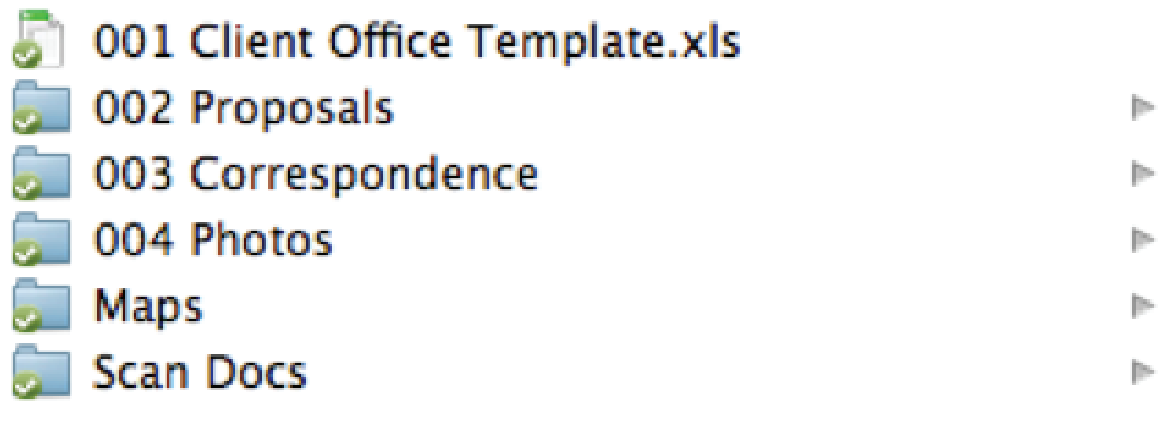
A) Contact Sheet, Production Information
B) Services Sold / Parameter Sheet
C) Drawing / Computer Drawings of Site
D) Maps
E) Site Photos
F) Damage Photos

2. CLIENT PROFILE Computer Copy

One way to keep the information on a client is to have a folder named "CLIENT" with sub-folders with the client's name. Each client (Client Profile) has the sub-folders below. There should be a way to secure the folders from anyone that will be viewing the content. And there should be only one person or one group that adds / changes / update the information.

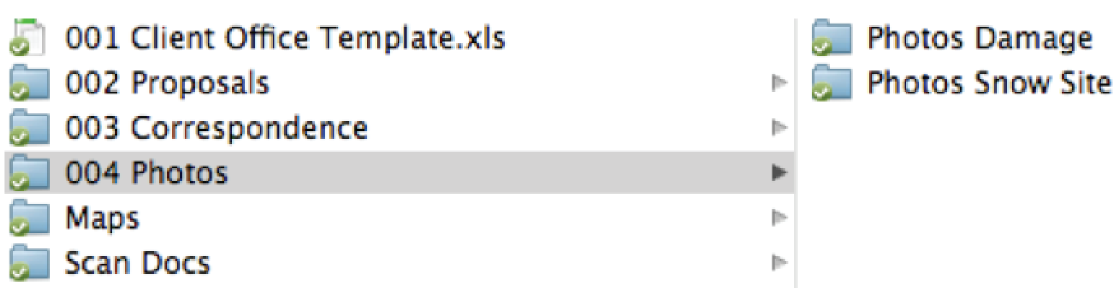
The result of a computer version of the Contract Packet is to have all of the information on a client in one place. This makes it easy to access both now and in the future.

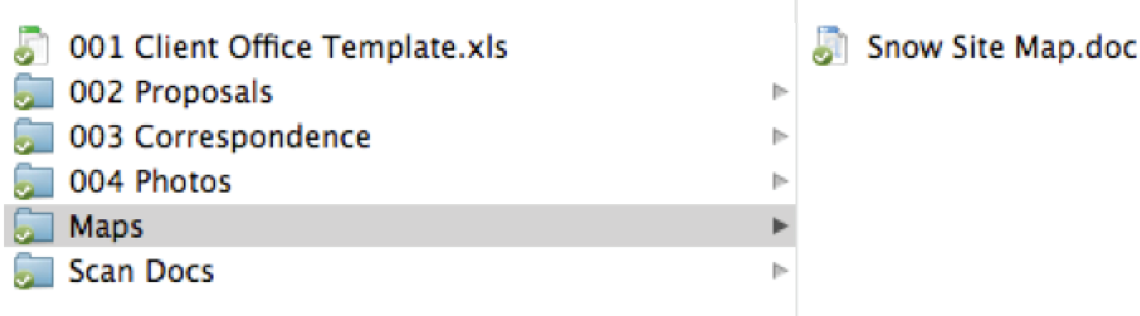
Below you can see what the Production Department would need for their Contract Packet. This is the list of folders under one client and each client would have their own collection of folders like this.


001 Client Office Template.xls
002 Proposals
003 Correspondence
004 Photos
Maps
Scan Docs


001 Client Office Template.xls
002 Proposals
003 Correspondence
004 Photos
Maps
Scan Docs
Accepted
Rejected


001 Client Office Template.xls
002 Proposals
003 Correspondence
004 Photos
Maps
Scan Docs
Collection
Email
Faxes
Letters


001 Client Office Template.xls
002 Proposals
003 Correspondence
004 Photos
Maps
Scan Docs
Photos Damage
Photos Snow Site


001 Client Office Template.xls
002 Proposals
003 Correspondence
004 Photos
Maps
Scan Docs
Snow Site Map.doc

3. CLIENT PROFILE Checklist

This is used to track all the work that has to be done for each new client. It will help to have all the components of the support systems to be done and each part is recorded on this checklist.

4. CLIENT PROFILE Contact Sheet

This is used for the computer version of the contact information. This is so the Accounting Department has all the contact information on the client that they need.