



THE SNOW MILLIONAIRE MASTERY *Intensive*

ESTIMATE PROCESS

“I fear not the man who has practiced 10,000 kicks once, but I fear the man who has practiced one kick 10,000 times.”

Bruce Lee

First, I would fear the man that Bruce Lee fears. Second, this man that has kicked just one kick over 10,000 times knows a thing or two about consistency.

And what we will be looking at with this module is consistency when estimating the work, quoting work, and a consistent proposals.

The Result: we will know what it is like to have anyone in our organization get consistent numbers and pricing for our snow work and get the proposal to the client quicker.

An organization should be systems dependent... Not people dependent.

We have just looked at two of the first parts of the Sales Systems and the Sales Flow: Qualification and Tracking.

But... one area that we discussed in the Sales Introduction, “how do you ensure the sales work gets done correctly and how do you ensure that the client requests are handled as efficiently and quickly?”

The top tool in our toolbox to make this consistency in pricing is an estimating tool. We do most of our quoting in a per inch, per hour, and a per season method. So how do we give our organization the tool that gives consistent pricing?

And....

The second tool will take the estimate prices in a quick and dirty way into a proposal template. Just one template is needed because the only thing that changes are the prices.

The final result of this module will take the chaos and confusion that plague so many organizations and gives us, the owners: **Peace of Mind**. The result will be estimating consistently and quickly and getting the proposal into the client’s hands ASAP.

There are three areas that we will examine below:

- The Estimate Process – The flow that the sales and or the production department takes to estimate work in the field and in the office.
- The Estimate Work Order – The Estimate work order template that either sales or production uses while estimating the work.
- Going to the site to measure physically and Staying in the office to measure using software.

In the next two Sub-Modules for the Sales Systems, we will understand, create and then implement:

1. **Estimate Systems and Process:** We will look at an estimating flow process, estimate work order templates, and The Crown Jewel, “The Estimate System”, an estimating calculation system. Consistency is the goal in this sub module.
2. **Proposal Templates:** Using 1 proposal template that has one area change (method of pricing), will make for more efficiencies.

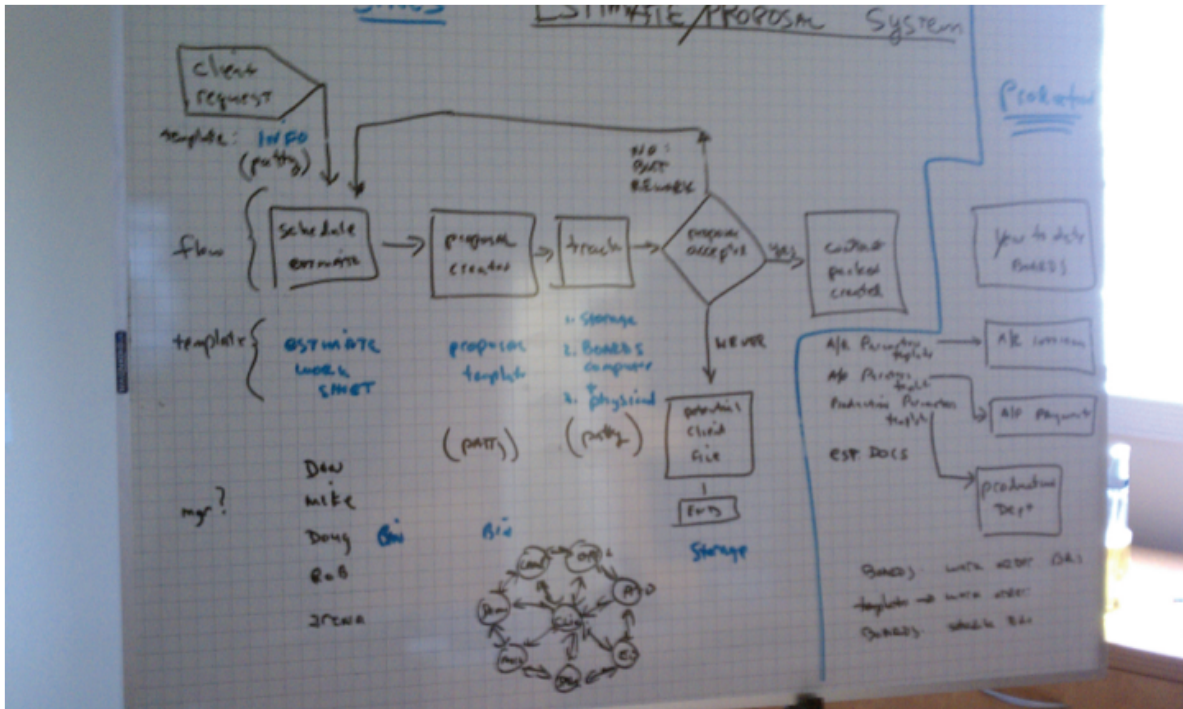
THE ESTIMATE and PROPOSAL PROCESS

1. Sales Assistant prepares the estimate work order. Print client's name and the complete physical address of the site. Attach a map.
2. Bring to the site the following items:
 - Clipboard
 - Work Orders
 - Measuring Wheel
 - Camera
3. Sales or Production can schedule the work order.
4. Take all measurements of the lots and driveways. Take all measurements of the walk areas and docks. Total both on the bottom.
5. Make a sketch of the building, parking lots, and walks on the second page of the work order. Please include and label steps, doorways, lawn areas, fire hydrants, gates, manhole covers, dumpsters, loading docks, etc.
6. Take photos of all areas; especially take photos of the damage areas.
7. Circle if plowing the lot is Easy, Normal, or Difficult.
8. Return to the office and redraw the sketch, making sure all measurements are neat and checked. Write Estimator's name, date of work, the total square footage of the lot and walks, and the difficulty rating on the top of the drawing. Also, label all adjacent roads and streets on the drawing. Color-code and highlight all lots, driveways, and entrances in yellow, walks and docks in orange, grass areas in green, snow stacking areas in blue, and hazard areas in red.
9. Print out photos and label areas.

10. Download your photos and store into the Potential Client Profile folder under site name.
11. Staple in order the work order, map, drawing, and photos. The manager or estimator will approve the work order and initial in top right corner of work order.
12. If estimating was done my production, then the work order goes to the Snow Sales Department to calculation the snow prices.
13. Using the 7 of 7 BEST Estimate Tool, add the total lot sq footage, the total walks sq footage, and the rating number into the estimating system.
14. If the numbers need to be adjusted, use the adjustment changer.
15. Once the numbers are approved, add the billing method and the numbers to the proposal.
16. Put the estimate work order, photos, and all correspondences into one packet: the Contract Packet. Sales Manager approves and initials the packet.
17. Approved proposals are sent to client via, hand delivery, email, faxed, or snail mail.
18. Put information on the tracking device

The systems are what run the company and the people are what will run your systems. Systemic thinking is the real secret behind building an organization that works.

SALES FLOW NEED A NEW FLOW HERE



Ok Ladies and Gents,
 Watch the Video,
 Work with the Templates,
 And if you have any question or need help,
 Need Help, Summit the Request Form.

Be Great, Domenic