Proposal System Flow

1. Admin Prepares Proposal Template	1. Sales Assistant pulls the proposal template from the folder. Add the client's name and the invoice address.
2. Add the information to the proposal	2. Add all quoted prices and type of contract (seasonal / per push / per inch). Save proposal in the potential client folder.
3. Print out proposal and attach to packet	3. Print out proposal and attach to the top of the estimate work packet.
4. Put in holding area to be approved	4. Put in holding area to be approved.
5. Sales manager reviews proposal	5. Sales Manager reviews the proposal packet: the estimate work order, the correspondences, the calculation sheet, and the notes.
6. Proposal is approved	6. Sign the top right of proposal to approve proposal.
7. Proposal is prepared	7. Sales Assistant makes any adjustments made to the proposal from the Sales Manager approved proposal packet.

8. Proposal is delivered and tracked	8. Sales Assistant per delivery instructions: Deliver the proposal: snail mail, e-mail, fax, or hand delivery. Post statues to Tracking System.
9. Store in waiting bin	9. Store Proposal Packet in the "Waiting Client Proposal" Bin.
10. Sales meeting periodically	10. Revisit "Waiting Proposal" Bin periodically in the weekly Sales meeting.
Proposal?	11. Client reaches a decision: Reject, Needs adjustment, or Accept.
11a. Client Rejected Proposal	11 a. Rejected? File the Proposal packet into a Rejected Client Area. File electronic version in a Rejected Client Area. Send a thank you letter / email. Post statues to Tracking System. Go to 12.
11b. Client Needs Adjustment	11b. Needs adjustment? Return to step 5. Sales manager with the proposal packet and new information. Make adjustment and keep it into the proposal flow.
11c. Client Accepts Proposal	11c. Accepted? Create the Contract Packet and Prepare the pre-season work for both production and accounting.
12. Create Contract Packet and Pre Season Work	12. End of Proposal Flow.