ZOBO
Product Value Stream

Initial Client Contact

Quality Assurance

Proposal Preparation

Activation & Training

Follow-up Meeting

Activation Scheduling

Design & Engineering

Burn-in & Programming

"Closing the Sale"

Invoicing

Pre-Wire Scheduling

Trim Installation

Jobsite Walk-Thru

Job Prep & Purchasing

Pre-Wire Installation
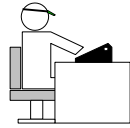
Trim Scheduling

Invoicing

July 2008
S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31
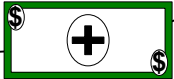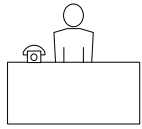
Initial Client Contact

BY: Salesperson

- ☑ Creates Contact Record in Goldmine
- ☐ Schedules initial client meeting & schedules conf. room in Goldmine

Discovery Sales Meeting

BY: Salesperson

- ☑ Follows Sales Outline to discover client wish list
- ☐ Sets date to deliver Proposal or Prelim. Est. with Discovery Agreement
- ☑ Provides client with Business Card and Sales Brochure

ZOBO
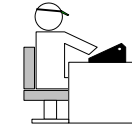## Product Value Stream

Page 1 of 4

Proposal Preparation

BY: Salesperson

- *Standard Account:* Creates Proposal with D-Tools
- *Design Account:* Creates Preliminary Estimate in D-tools with Prefab Pkgs
- *Design Account:* Prepares Discovery Agreement to accompany estimate
- Submits Proposal or Discovery Agreement via Email, Fax or Mail
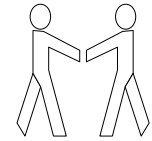- Within 24 hours, ensures client received information & schedules meeting
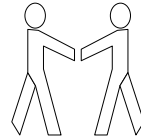
Follow-up Meeting

BY: Salesperson

- ☑ *Standard Account:* Reviews & client signs: 1) Proposal; 2) Plans; 3) Scope of Work
- ☑ Presents & reviews WirePath Glossary of Terms
- **Print COGS report, Billing Summary** & Proposal to PDF files; **submit** hardcopies (including **all docs signed** by the customer) *to Accounting*
- Fax **Billing Summary**, **Signed Proposal** & **Signed Floor Plans** *to the Builder*
- ☑ Ensures all info in D-Tools file & Goldmine is correct
- To: Craig@cc.net / Subject: HOD-1342-CV — **Sends email to Project Manager** w/: 1) Tentative walk-thru date, 2) Link to D-Tools file & Scope of Work, 3) Client Name
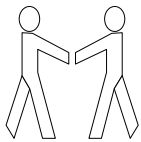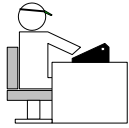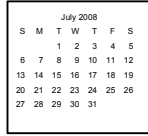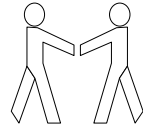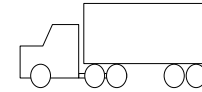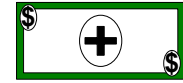
Next Step: "PM Job Review" on p. 2

BY: Salesperson

- ☑ *Design Account:* Signs Discovery Agreement & collects retainer
- ☐ Sets date to deliver Home Design Package
- ☑ Submits retainer $ and signed agreement to Accounting
- ☐ Schedules briefing with an Engineer in Goldmine

Design & Engineering

BY: Salesperson

- ☑ *Design Account:* Briefs Engineer on client requirements
- ☑ Delivers copy of Discovery Agreement & notes

BY: System Engineer

- ☑ Engineers job & creates elevation drawings, plans, schematics, etc.
- ☑ Prints draft copy and submits to Salesperson

BY: Salesperson

- ☑ Reviews job to ensure client requirements met
- ☑ Submits changes via email or in writing on draft copy

BY: System Engineer

- ☑ Makes changes, if any, from sales-person review
- ☑ Prints & binds final copies; delivers to salesperson

BY: Salesperson

- Submits Home Design via Email, Fax or Mail
- Within 24 hours, ensures client received information & schedules meeting

"Closing the Sale"

BY: Salesperson

- ☑ *Design Account:* Reviews & client signs: 1) Proposal; 2) Plans; 3) Scope of Work
- ☑ Presents & reviews WirePath Glossary of Terms
- **Print COGS report, Billing Summary** & Proposal to PDF files; **submit** hardcopies (including **all docs signed** by the customer) *to Accounting*
- Fax **Billing Summary**, **Signed Proposal** & **Signed Floor Plans** *to the Builder*
- ☑ Ensures all info in D-Tools file & Goldmine is correct
- To: Craig@cc.net / Subject: HOD-1342-CV — **Sends email to Project Manager** w/: 1) Tentative walk-thru date, 2) Link to D-Tools file & Scope of Work, 3) Client Name
- To: Craig@cc.net / Subject: HOD-1342-CV — **Sends Post Sales Survey Questionnaire** to customer (Mandatory)

Next Step: "PM Job Review" on p. 2

BY: Accounting

- Estimate #1232 — Creates QuickBook Estimate from Billing Summary
- ☑ Assigns job to Salesperson for commission
- Prints label for job folder and files

Project Manager Review

BY: Project Manager

D-Tools Proposal — From sales rep email– Reviews project docs & ensures all needed items are included in proposal

Incomplete Designs: Project Manager emails concerns to Director of Sales for review

July 2008 calendar — Enters tentative prewire date in Goldmine & planner as reminder to call

Pre-Wire Scheduling

BY: Project Manager

Contacts/calls job superintendent to schedule pre-wire (Can be tentative)

Sets up pre-wire walk-thru date/time with job super (and client, if applicable)

July 2008 calendar — Schedules pre-wire crew in Goldmine with firm date

Jobsite Walk-Thru

BY: Project Manager

Completes pre-wire walk-thru with client (Sales may be present)

Ensures house and/or floorplans properly marked; updates D-Tools file

Coordinates with other trades & provides plans and drawings as needed

Calls superintendent 24-48 hrs before installation to confirm

BY: Warehouse Mngr.

D-Tools Reports — Prints Job Packet for Prewire Phase

July 2008 calendar — Reviews job's "Special Order" report & schedules date to order Trim & Activation items *(The trim date may be tentative)*

Stages job from pick list & places Job Packet in assigned crew's bin

Creates "Needed Stock" list on the fly as inventory is pulled for jobs

Purchase Order — Generates & processes Purchase Orders to maintain minimum inventory levels

Pre-Wire Installation

BY: Installation Crew

Reviews Job Packet to ensure completeness & to identify questions

D-Tools Report — Checks staged materials against Prewire Pick List and loads truck

Completes installation following WirePath standards & procedures

Completes final walk-thru, quality scorecard & signs Project Hours Report

D-Tools Reports — Places Job Packet in "Completed" bin *Fill in Punch List for any outstanding items such as "Door not set in Living Room — wire on right side"*

BY: Project Manager

Visits jobsite & completes Quality Scorecard; ensures job prewired to plan

July 2008 calendar — Schedules Trim date in Goldmine (Will be tentative)

Optional: Lets job superintendent know all work is complete

Invoicing

BY: Accounting

Collects Job Packets from "Completed" bin each day

Invoice #564 — Creates Invoice from Estimate for 65% of the project total

If applicable, attaches builder Work Orders & other forms to Invoice

Mails invoice(s) & related forms to builders and clients

ZOBO
Product Value Stream
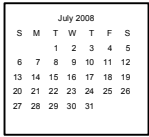
Trim Scheduling
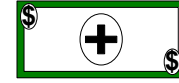
BY: Project Manager

- Contacts job superintendent to schedule trim
- Schedules trim crew in Goldmine with firm date
- Emails Burn-in Lab Mngr & Programmer with link to job folder & activation date

Job Prep & Purchasing

BY: Project Manager

- Calls superintendent 24-48 hrs before scheduled installation
- If applicable, checks on other trades that impact trim or activation phases

BY: Warehouse Mngr.

- Prints Job Packet for Trim Phase
- Stages job from pick list & places job packet in assigned crew's bin

  NOTE: The special order items needed for the Trim & Activations Phases were ordered 45 days before the tentative trim date

- Begins staging Activation Phase components
- Creates "Needed Stock" list on the fly as inventory is pulled for jobs
- Generates & processes Purchase Orders to maintain minimum inventory levels

Trim Installation

BY: Installation Crew

- Reviews Job Packet to ensure completeness & to identify questions
- Checks staged materials against Trim Pick List and loads truck
- Completes installation following WirePath standards & procedures
- Completes final walk-thru, quality scorecard & signs Project Hours Report
- Places Job Packet in "Completed" bin

  Fill in Punch List for any outstanding items such as "Door not set in Living Room — wire on right side"

BY: Project Manager

- Visits jobsite & completes Quality Scorecard; ensures job trimmed to plan
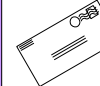- Schedules Activation date in Goldmine (May be tentative)
- *Optional:* Lets job superintendent know all work is complete

Invoicing

BY: Accounting

- Collects Job Packets from "Completed" bin each day
- Creates Invoice from Estimate for 35% of the project total
- If applicable, attaches builder Work Orders & other forms to Invoice
- Mails invoice(s) & related forms to builders and clients

ZOBO
Product Value Stream
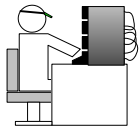
Burn-in & Programming

BY: Burn-in Lab Mngr
- Assembles system per Scope of Work & D-Tools
- Notifies Project Mngr & Programmer that system is tested & operational

BY: Project Manager
- Drafts cheat sheet & labels remotes for client, if applicable

BY: Programmer
- Programs system per Scope of Work & D-Tools
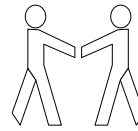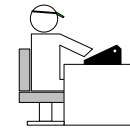- Test and retests remote controls/control devices
- Emails Project Mngr and Salesperson when completed & lists possible issues

BY: Lab Mngr
- Repacks equipment & stages job for delivery
- Submits warranty cards & cheat sheet to Project Manager for "Wow" binder

Activation Scheduling

BY: Project Manager
- Calls homeowner to schedule activation; notifies superintendent
- Explains installation schedule to client and "Under Promises"
- Schedules his time and Activation crew
- Emails salesperson with final activation date and time
- Emails Burn-in Lab Mngr & Programmer with final activation schedule & date(s)
- Prepares "Wow" binder with standard documents & equip. warranty cards

BY: Warehouse Mngr.
- Stages job from pick list & places job packet in assigned crew's bin
- Creates "Needed Stock" list on the fly as inventory is pulled for jobs
- Generates & processes Purchase Orders to maintain minimum inventory levels

Activation & Training

BY: Installation Crew
- Checks staged materials against Activation Pick List and loads truck
- Completes delivery & installation as directed by on-site Project Manager
- Installs and activates system per design specs

BY: Programmer
- Complete required on-site programming & troubleshoots systems
- Documents changes and saves back-up copy

BY: Project Manager
- Demonstrates system, trains client, and resolves product or service concerns
- Presents client with "Wow" binder and reviews contents
- Gets client final signoff and collects balance, if applicable
- Presents client with Thank You gift

Quality Assurance

BY: Project Manager
- Updates D-Tools file to "As Built" status
- Submits final payment to Accounting, if applicable
- Emails Salesperson when job is finished with any BTWs

BY: Accounting
- Books final payment and ensures all change orders have been paid
- Closes out account
- Marks project folder as COMPLETE and files in archives
- Emails Customer Satisfaction Survey for Installation

BY: Salesperson
- Schedules 1 month, 6 month & 12 month Customer Care calls
- Within 48 hours, mails customer Thank You note
- Call client within 72 hours to thank, check on satisfaction & request referrals
- Completes 1-month, 6-month, and 1-year Customer Care calls; results in Goldmine

Next Step: "Discovery Sales Meeting"

ZOBO
Product Value Stream

Page 4 of 4