


# Contractor Business People Components

Those to whom sequences, tasks and follow-ups are assigned:



**SUSPECTS**  
Cold Contacts  
Referrals to Customer Care Program  
Mailing Lists  
Expo Biz Card Drops  
Cross Endorsements  
Mailing  
Neighborhood farms

**PROSPECTS**  
Referrals/request for estimates/information  
designs/consultations  
Contacts : Expos  
Mailings /Yellow Pages from past /current /future clients

**NEW /RETURNING CLIENTS**  
File created, proposed, consulted, estimated, designed negotiated, accepted, contract signed scheduled and initiated

**Business Referral Partners**  
Ins. Agents, Attorneys, Acct.s, Realtors, Landscapers Plumbers, etc. Chamber/Assoc./Leads groups

**Sub - Contractors:** responsible for sub-phases of overall project

**Suppliers:** provide materials, finished components, resources to bid, design, spec, plan, install, build and maintain project

**Business Support Services:** CPA's, Financial and Business Advisors, Tax Specialists, Insurance agents

**Staff Mgmt/Office/Field:** Supervisors, Crew Chiefs, Crew members, Office Admin, Sales Staff  
Quality Control, Accounting, Estimation, Marketing

**Company Administration:** CEO, CFO, Founder, Director, President, Vice-Pres. Licensee, Licensor, Franchisee

Office Manager

Qualify, send/email/call ask questions, Input data in Database

Incoming call with Referral

Confirm Special Instructions, spec.s for projects

Campaign for referral vote & reciprocity at chamber/network/ association events  
Follow-up w/ personal note !!

Recruit by Referral where possible and interview for viability

Create file for new supplier, share allied partner expectations at start of relationship

Create contact file for new Bus. Support service. Share allied partner expectations at start of relationship

Create associate file, share associate standards, expectations and procedures order HP Snapshot

Define, establish Core values, target market and ideal company culture elements, goals and vision

Receptionist

Determine timeline and depth of interest

Complete Intake questionnaire

Create Job Sheet  
Pick-up Permit  
Post Permit  
Post Sign

Learn other referral partners "60 Second Commercials", greetings, recite back on demand. Give referrals !!

Take Aboard? Enough training, Tools, skills, insurance & attitude?

Lunch w/ Reps quarterly, share bus. develop. tools, schedule product education support for staff

Lunch w/ Support partners quarterly, share bus. develop. tools, schedule product education support for staff

Discuss scope of work, targets and goals with associates. Schedule Qtrly and Annual reviews

Plan monthly meetings & Qtrly reviews and annual retreats with Core Leaders

Marketing Manager

Invite into Customer Care program

Assign Estimator or refer to other contractor

Set up Crew & Materials

Invite into Advocate Care program & to Gratitude Gatherings send "welcome" packet

Sign Paperwork, 1099, I-9, get copies of insurance riders? sign off on contract & policy expectations

Lunch w/ Rep.s as advocates Invite to Gratitude Gatherings

Build/Grow Bus. Support Partners as advocates Invite to Gratitude Gatherings

Provide open forums & feedback sessions for associates to voice: What/where are we doing well? What/where can we improve?

Connect with Business Partners & Develop strategic partnerships with like-minded organizations

Salesperson/Estimator

No Interest? Can we refer to other service or request referrals? No? Delete!

Call or meet with client, Estimate project, deliver with hand written personal note, phone call one week afterwards determine timeline schedule follow-up call or visit

Quality Check During Check Completion Check Call Homeowner Every Time on Project

Send out personal notes Give, ask receive!!

Schedule weekly safety/product meetings plan monthly and quarterly review

Give Feedback to Suppliers and Rep.s from yourself and your clients

Create, Build & Maintain cross-endorsement Campaigns

Attend wkly Core meetings & qtrly Team Building activities

Take Regular time away from the Business Work in AND on the business

Field Supervisor

Yes? they need services /estimate later? Start drip call/email/mail testimonial campaign

Estimate Accepted? Signed Contract - Client Product and Project Education specific product, color, clients expectations & special instructions

Project Completed Walk through w/ client Call for Inspection/ follow up for passing inspection. Pick-up sign

Invite to lunch twice a year & share Business Development concepts

Offer oportunities for growth in process, skill and advancement

Give, ask and receive referrals to and from suppliers

Build strategic partnerships to empower your clients w/ exclusive benefits and extra support

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Plan, Implement, Refine & Realign Business Turnover, Exit Plan Strategy, and/ or Active Retirement phase

Crew Leader

Offer other introductory offers from other service providers

Upgrade prospect to Client database status

1 wk Follow-up Call-feedback survey \*Ask for Referral Invite to Qtrly Gratitude Gathering

Ask partners what is their ideal client or project. Introduce to your other partners & resources

Invite to Gratitude Gathering

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Provide growth and advancement opportunities

Develop new products, services & markets

Owner/President/CEO


Check in every three months to build relationships

Build Associates into Advocates

Scheduler/Material Coordinator

Business Developer

What is the intention or goal?



Convert to PROSPECT

Convert to CLIENT

Complete project and Convert to ADVOCATE

Empower, Educate, Refer & Nurture ADVOCACY

Support, Encourage, Improve & Elevate

Support, Share Core Values, Feedback and Resources

Share Referrals & Business Development

Recruit, Empower, Re-Invest In, Create Opportunities for Growth, Promote and Retain

Work Hard, Play Hard, Plan, Strategize, Compete, Identify, Build and Defend Culture & Win Market Share