

**SALES**

**New Account/  
Subdivision  
Awarded**

- Sales receives plans from builder and sends to Digitizing

**KEYS TO SUCCESS**

- Building relationships with customers is an ongoing process that can take years. It requires persistence.
- We win around one new customer per year
- New Subdivision awarded a few times per year

**DIGITIZING**

**Plans estimated**

- Converting blue prints from customer to our measuring system so bids and budgets can be created
- Creates the measurements for Order Entry to order material.

**KEYS TO SUCCESS**

- Obtaining pertinent details and builder specifications
- Beginning of whole order process. Accuracy is KEY.

**SALES SUPPORT**

**Estimates converted to Spreadsheets, Bids & Plans (Special Quotes)**

- Initial bids and budgets created and sent to customer for review

**KEYS TO SUCCESS**

- Communication with all departments
- Problem solving
- Fully understand all roles and how they interact and rely on each other
- Help us maintain profitability

**DESIGN STUDIO**

**Homeowner makes selections**

- may use our studio or other third party
- send selection sheets to builder
- refer to Window Coverings during design process

**KEYS TO SUCCESS**

- Helping home buyers turn their vision into reality
- Accuracy of selections (changes) can affect the whole process.

**CUSTOMER SERVICE ORDER ENTRY**

**Order entered into system**

- Create work order based on customer's selection sheets
- Send work order to Quality Control for verification

**KEYS TO SUCCESS**

- Creating accurate work orders and diagrams are critical to our overall success.
- Attention to detail

**QUALITY CONTROL**

**Verify order details**

- Report any concerns back to Customer Service

**KEYS TO SUCCESS**

- Know the unique process for each builder
- Verify specific products (size/color/style/vendor)

**PURCHASING**

**Order Material**

- Ensure materials arrive when needed

**KEYS TO SUCCESS**

- Communicate availability issues with vendors and sales team

**PRE-BILLING**

**Create Builder Invoice**

- Obtain and verify PO amount matches invoice amount
- Builder pays before job begins (ideally)

**KEYS TO SUCCESS**

- Work with builders to resolve any issues or changes to invoices
- Communication between builder account, sales team, and order entry

**WINDOW COVERINGS & GARAGE FLOORS**

**CUSTOMER SERVICE**

**Process & Schedule Work Order**

- Process the Order, print packets
- Direct communication to builder
- Works with multiple scheduling systems

**KEYS TO SUCCESS**

- Problem solving with installers on job site
- Understanding full production timeline to ensure successful scheduling

**RESOLUTION**

**Schedule Repair Work Order**

- Determine issues, materials needed, order materials
- Document what installer needs to do on job

**KEYS TO SUCCESS**

- Complete and detailed information

**FIELD SERVICES**

**Assign & Manage Installation Crew**

- Review work orders with installers
- Pre & Post walk the job site for accuracy & completion

**KEYS TO SUCCESS**

- Quality communication with installers and builders to maintain relationships

**WAREHOUSE**

**Recieve & Load Job Materials**

- Inventory Management

**KEYS TO SUCCESS**

- Accurate shipments; handling materials to ensure nothing is broken
- Verfyng shipments so installation material is accurate.

**INSTALLERS**

**Product Installed in home according to industry standards**

- Installer turns work order packet into Field Services who give it to Accounting.

**KEYS TO SUCCESS**

- Open communication between installer and field supervisor regarding jobsite challenges.
- Quality Installation

**ACCOUNTING**

**Process Installer Payroll**

- Post labor costs to job
- Pay vendor invoices

**KEYS TO SUCCESS**

- Timely payments & processing discounts
- Understanding accuracy of product pricing and how it affects profits.

**FINAL BILLING**

**Invoice Builder**

- Confirm Purchase Order matches job

**KEYS TO SUCCESS**

- Accurate and timely processing and distribution of invoices to customer

**ACCOUNTS RECEIVABLE**

**Receive Payments**

- Post to jobs
- Monitor customer's pay terms and outstanding debt

**KEYS TO SUCCESS**

- Posting payments to correct jobs to ensure commissions are accurate

**COMPANY LEADERSHIP & INTERNAL SUPPORT**

**HUMAN RESOURCES**

- Hiring & Onboarding
- Payroll
- Performance Reviews
- Office Management
- Team Culture

**KEYS TO SUCCESS**

- Accurate job placement
- Prompt reaction to valid concerns
- Consistency

**FINANCE**

- Pay bills
- Facility Management
- Cashflow Management

**KEYS TO SUCCESS**

- Protecting the company's investment
- Adherence to governed regulations

**EXECUTIVE LEADERSHIP**

- Customer Relationships
- Company-wide Decisions
- Vendor Management
- Internal Processes

**KEYS TO SUCCESS**

- Transparency, open and honest communication from all depts.
- Promoting company image and culture