1. Front Desk - Opportunity comes in - Get Information
    a. Get the following information:
        i. Business name
        ii. Contact name
        iii. Contact phone number
        iv. Contact email address
        v. Bill to address
        vi. Location address (for install)
    b. Project Manager - Determine project needs/scope of work
        i. What is the client needing/looking for?
        ii. Get as much information from the client as possible.
        iii. Ask for their budget. You can explain to them that this will help us determine the best solution for their budget.
        iv. Determine what they're thinking for design
            1. Color scheme
            2. Do they have a logo that they want to use or just text? Do they need logo creation?
            3. Do they have dimensions in mind?
            4. If applicable, do they want their sign illuminated or non-illuminated?
            5. If applicable, single or double sided sign?
            6. If applicable, ask for sizing that they want (this is especially helpful for smaller things like banners, vehicle graphics/magnets, etc.)
            7. If vehicle graphic, ask them to send photos or measurements of vehicle
        v. Ask for their time frame - when do they need the product/service by?

2. Designers - Enter Information into ShopVox
    a. Start a new quote for the opportunity. This needs to happen immediately after receiving the call/email while the project details are fresh in your mind.
    b. Make sure to enter all business, contact, etc. information. See sales document that was sent previously for steps on how to do this. Unless it is a walk-in client (not with a business), the quote will always go under the business name, and the contact information will go under Contact.
    c. Enter all project notes, details, assets (photos, designs, etc.) - anything that is useful information and needed for the project.
    d. Set a task for the next step (survey, design, code research, quote, etc.). Always leave each quote/opportunity with a next step - even if you sent the quote, set up a task to follow up.

3. Project Managers - Quote the project
    a. For easy things (banners, yard signs, business cards, simple flat signs, etc), aim to get the quote out to the client within 24 hours.

b. Projects that require surveys, code research, and/or designs - aim to get information back to the client (design and/or quote) within 2-3 business days.
c. Service calls - give rates to the client over the phone or through email same day.
d. Either send the quote directly through Shopvox (the quote status will automatically be changed to client review), or if the client prefers a quote PDF to be sent via regular email that is fine too. If sent via regular email, make sure to change the quote status to “delivered.”

4. Project Managers - Follow Up
    a. If the quote has been sent but you haven’t heard back from the client, follow up on that quote within a week of sending (unless the client told you that it would be a while before they made a decision, then follow up around the time that they gave you).
    b. Goal is ultimately to sell the project, but also to clean up our quotes list so that we don’t have a lot of open quotes in the system without answers from the client.
    c. Leave quotes as “client review” or “delivered” until you either get an answer back from the client or it has been 3-4 months without any word from the client (they won’t respond to email and call attempts).
    d. If the project is lost, try to get a reason from the client as to why we lost the project (price, turnaround time, etc.). This helps us to see what we could have done differently. Once the project is lost (or if it’s been months without hearing from the client after follow up attempts) change the quote status to “lost.” This leaves the quote in the system in case we need to access it, but also tells the sales team that the opportunity is lost.

5. Greg - Quote Approval Received
    a. Once the quote has been approved and you receive the 50% deposit (or payment in full for small orders), convert the quote to a sales order (see sales document previously sent for step by step instructions).
    b. Make sure that you enter the correct information
        i. Due date
        ii. Approved artwork (or instructions for design if a design has not been completed yet)
        iii. Any special instructions needed for production and/or installation
        iv. Make sure that each line item calls out the right information
            1. Sizes are correct
            2. BOM calls out the right information
            3. Colors
            4. Etc.
    c. Covert line items to jobs (this will be the work orders for production)
        i. Choose the right workflow for each line item

ii. Enter any special information needed to be on the work order (when applicable) under the relevant area (design, production, shipping, install, special instructions).