

1. Weekly Pipeline Reports
  - a. Every Monday morning, update the pipeline report for the regional VP of Sales.
    - i. For Sold Buildings:
      1. Remove any buildings that have started production since last week from the report.
      2. Update production stages for required materials.
    - ii. For Quotes likely to go to PO:
      1. Add any quotes likely to go to PO.
      2. Remove any quotes you were told are no longer likely to go to PO.
      3. Make any changes to likelihood percentage necessary.
      4. Make notes for any info you have on the quotes from the dealer's salesperson.
2. Mid Month Sales Reports
  - a. At close of business on the 15th of the month, send the VP of sales:
    - i. A report for **All Quotes by Salesperson** from the 1<sup>st</sup> til the 15<sup>th</sup>. Save as PDF.
    - ii. A report for **Sold Quotes by Salesperson** from the 1<sup>st</sup> til the 15<sup>th</sup>. Save as PDF.
3. End of Month Sales Reports
  - a. At close of business on the last day of the month, send the VP of sales:
    - i. A report for **All Quotes by Salesperson** for the month. Save as PDF.
    - ii. A report for **Sold Quotes by Salesperson** for the month. Save as PDF.