# <u>Pre-Customer Meeting Requirements</u>

1. Pre-Customer Meeting Preparation:
    - Design
        - i. Print Plans and distribute to the following people:
            1. GM
            2. Purchasing Manager
            3. Production Manager
            4. Sales Rep
            5. HVAC Foreman
            6. Electrical Foreman
            7. Plumbing Foreman
            8. Sidewalls/Roofs Foreman
            9. Final Pad Foreman
            10. Any other pertinent foreman.
    - Project Coordinator
        - i. Try to set the meeting for 2 days after foreman receive prints.
            1. People required at meeting:
                - a. GM
                - b. Purchasing Manager
                - c. Production Manager
                - d. Sales Rep
                - e. Project Coordinator
                - f. Design Manager and/or drafter.
        - ii. Create Color Selection Sheet based on Sales Provided Color Selection Form.
            1. Email to sales/purchasing for review prior to meeting.
    - Design
        - i. Print one set of large prints to be the redline prints
        - ii. Draft the NLEA and Scope of Work that we will submit to the state and put on the front page of the plan.
    - GM
        - i. Review plans and bring notes.
    - Production Manager
        - i. Make sure all foremen review the building and give you redlines.
        - ii. Review plans and bring notes.
    - Purchasing Manager
        - i. Review plans and bring notes.
        - ii. Review the long lead form given by sales in the handoff email. Verify lead times and note any long lead items missed by sales.
        - iii. Review the Color Selection Form.
    - Sales Rep
        - i. Review plans and bring notes.

ii. Review the Color Selection Form sent by the PC.

2. Pre-Customer Meeting Responsibilities
   - Sales Rep
     i. Run the meeting.
        1. Go sheet by sheet to collect all redlines from all parties.
        2. Start with major issues if there are known issues.
     ii. Bring forward any deviations from sales release.
     iii. Note changes to the NLEA and Color Selection Form necessary or recommended.
     iv. Note any issues brought forward that would have an associated cost.
     v. Note any issues that would require a conversation with the customer.
     vi. Come prepared with any cut sheets requested by the rest of the team.
   - Production Manager
     i. Collect redlines from all foreman and bring to meeting. Relay all issues to design manager or drafter.
   - GM
     i. Help coordinate redlines and final say on any construction issues.
   - Purchasing Manager
     i. Come with notes on lead times.
     ii. Come with notes on any material issues not covered by sales.
     iii. Come with questions about where sales sourced custom items if needed.
   - Project Coordinator
     i. Take notes.
     ii. Notify teams how long they have to make corrections before we miss our scheduled drawings date.
     iii. Bring customer color selection sheet for sales/purchasing to verify.
   - Design Manager/Drafter
     i. Mark up the large prints with all redlines needing fixed in CAD.

3. Pre-Customer Meeting Common Outcomes & Responsibilities
   - Drafter
     i. Fix redlines that were recorded in meeting.
   - Design Manager
     i. Review drafter's updated plans after redlines are fixed. Be sure all redlines were accounted for.
     ii. Send updated plans after your review to the GM & Sales for verification of accuracy.
   - Sales Rep

        i. Approach the customer for any ambiguous or required information design/production/purchasing needs. **Speed is important here if there are questions**.
        ii. Review drafter's updated plans after redlines are fixed. Be sure all redlines were accounted for.
    - GM
        i. Review drafter's updated plans after redlines are fixed. Be sure all redlines were accounted for
    - Purchasing Manager
        i. Add long lead items to ordering schedule based on offline date from the schedule letter.
        ii. Set up accounts with any new vendors Sales sourced for building materials or 3rd party labor.
    - Production Manager
        i. Relay to all foreman which of their redlines were accounted for or, rarely, advised against taking.
4. Sending to Customer
    - Project Coordinator
        i. Update Color Selection Form if needed.
        ii. Once the GM, Sales Rep, and Design Manager agree the plans are ready for the customer, send them to the customer along with the color selection form and schedule letter.
            1. Also copy any notes Sales/Design/GM wanted to be relayed with the prints in your email body.
                a. CC the sales rep on the email.