

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 1st til the 15th. Save as PDF.
 - ii. A report for **Sold Quotes by Salesperson** from the 1st til the 15th. 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.