

## **Pre-Customer Meeting Requirements**

### **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.
  - ii. 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.
  - Project Coordinator
    - i. Try to set the meeting for 2 days after foreman receive prints.
    - 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 3<sup>rd</sup> 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.