

# Gutter Project Workflow

## Lead Phase

- **Input Customer Information** - OFFICE\_STAFF
    - Make sure the name is spelled correctly.
    - Make sure the email is correct. Send a confirmation email to confirm the email.
  - **Complete Questions to Ask Checklist** - OFFICE\_STAFF
    - Input answers from the Question Checklist into notes.
    - Record property details.
  - **Input Lead Supporting Property Information** - OFFICE\_STAFF
    - Add Home View photos from Maps.
    - Add Street View photos from Google Maps.
    - Add elevation screenshot.
  - **Assign A Project Manager** - OFFICE\_STAFF
    - Select and brief the Project Manager.
  - **Schedule Initial Inspection** - OFFICE\_STAFF
    - Call the Customer and arrange based on the PM's schedule.
    - Create a Calendar Appointment for the Project Manager.
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## Prospect Phase

- **Site Inspection** - PROJECT\_MANAGER
    - Take site photos of existing gutters and fascia.
    - Complete the Inspection form, noting any wood rot or damage.
    - Document the linear footage and downspout locations.
    - Discuss gutter type (e.g., seamless, sectional), material (e.g., aluminum, steel, copper), and color options with the customer.
    - Present upgrade options (e.g., gutter guards, larger downspouts).
  - **Write Estimate** - PROJECT\_MANAGER
    - Fill out the Estimate Form with all measurements and material choices.
    - Write the initial estimate in the system and send it to the customer for approval.
    - Follow up with the customer for approval.
    - Let the Office know the agreement is ready to sign.
  - **Agreement Signing** - ADMINISTRATION
    - Review the agreement with the customer and send a signature request.
    - Record in QuickBooks.
    - Process the deposit.
    - Send and collect signatures for any applicable disclaimers.
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## Approved Phase

- **Administrative Setup** - ADMINISTRATION
    - Order materials (gutters, downspouts, hangers, sealant, etc.).
    - Create labor orders.
  - **Pre-Job Actions** - OFFICE\_STAFF
    - Pull necessary permits if required by the municipality.
  - **Prepare for Production** - ADMINISTRATION
    - Ensure all necessary pictures are in the job file.
    - Verify the labor order in the scheduler, checking for correct dates and crew selection.
    - Determine if reminder communication needs to be sent to the homeowner.
  - **Verify Material Orders** - ADMINISTRATION
    - Confirm the order from each supplier.
    - Check for a confirmation email.
    - Make crew instructions for any materials from stock.
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## Execution Phase

- **Installation Process** - FIELD\_DIRECTOR
    - Document the work start.
    - Capture progress photos throughout the installation.
    - Monitor progress and add a Job Progress Note at the end of each day.
    - Upload pictures for the day.
  - **Quality Check** - FIELD\_DIRECTOR and ADMINISTRATION
    - Upload completion photos.
    - Complete a final inspection of the gutter installation, checking for proper slope and secure attachment.
  - **Update Customer** - ADMINISTRATION
    - Let the customer know the work is finished.
    - Send 2-4 photos of the completed work.
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## Completion Phase

- **Final Inspection** - OFFICE\_STAFF
  - Schedule a permit inspection if applicable.
  - Document the inspection results.
- **Financial Processing** - ADMINISTRATION
  - Verify the financial worksheet.
  - Send the final invoice and payment link to the customer.
- **AR Follow Up** - ADMINISTRATION

- Follow up on outstanding payments.
  - **Project Closeout - OFFICE\_STAFF**
    - Register any applicable warranties.
    - Send warranty documentation to the customer.
    - Send a receipt for the final payment and close the job.
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## Interior Paint Project Workflow

### Lead Phase

- **Input Customer Information - OFFICE\_STAFF**
    - Make sure the name is spelled correctly.
    - Make sure the email is correct and send a confirmation.
  - **Complete Questions to Ask Checklist - OFFICE\_STAFF**
    - Input answers into notes, including rooms to be painted, and if ceilings and trim are included.
  - **Assign A Project Manager - OFFICE\_STAFF**
    - Select and brief the Project Manager.
  - **Schedule Initial Consultation - OFFICE\_STAFF**
    - Call the Customer and arrange based on the PM's schedule.
    - Create a Calendar Appointment.
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### Prospect Phase

- **Site Visit & Consultation - PROJECT\_MANAGER**
  - Take photos of all rooms and surfaces to be painted.
  - Measure the square footage of walls, ceilings, and linear footage of trim.
  - Discuss paint colors, sheens, and types with the customer.
  - Identify necessary prep work (e.g., drywall repair, wallpaper removal, sanding).
  - Note any furniture or fixtures that will need to be moved or protected.
- **Write Estimate - PROJECT\_MANAGER**
  - Fill out the Estimate Form with detailed scope of work.
  - Write the initial estimate in the system and send it to the customer for approval.
  - Follow up with the customer.
  - Notify the Office when the agreement is ready.
- **Agreement Signing - ADMINISTRATION**
  - Review the agreement with the customer and send for signature.
  - Record in QuickBooks.
  - Process the deposit.

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## Approved Phase

- **Administrative Setup** - ADMINISTRATION
    - Order paint and necessary supplies (primer, tape, plastic, rollers, brushes).
    - Create labor orders.
  - **Pre-Job Actions** - OFFICE\_STAFF
    - Communicate with the customer to confirm the start date and provide instructions on how to prepare (e.g., removing valuables and clearing surfaces).
  - **Prepare for Production** - ADMINISTRATION
    - Verify the labor order in the scheduler.
    - Confirm paint colors and sheens are correctly noted for the crew.
    - Does reminder communication need to be sent to the homeowner?
  - **Verify Material Orders** - ADMINISTRATION
    - Confirm paint and supplies have been ordered or allocated from stock.
    - Receive confirmation from the supplier.
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## Execution Phase

- **Painting Process** - FIELD\_DIRECTOR
    - Document work start.
    - Oversee crew in prepping the area (covering floors, furniture, taping edges).
    - Ensure all necessary surface preparation is completed.
    - Capture progress photos.
    - Monitor the application of primer and paint.
    - Add a Job Progress Note at the end of each day.
    - Upload daily pictures.
  - **Quality Check** - FIELD\_DIRECTOR and ADMINISTRATION
    - Upload completion photos of all painted areas.
    - Conduct a final walkthrough to check for even coverage, clean lines, and any touch-up needs.
  - **Update Customer** - ADMINISTRATION
    - Inform the customer that the painting is complete.
    - Send photos of the finished work.
    - Schedule a final walkthrough with the customer if requested.
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## Completion Phase

- **Financial Processing** - ADMINISTRATION
  - Verify the final project costs.

- Send the final invoice and payment link.
- **AR Follow Up - ADMINISTRATION**
  - Follow up on the final payment.
- **Project Closeout - OFFICE\_STAFF**
  - Provide the customer with information on leftover paint for future touch-ups.
  - Send a receipt for the final payment.
  - Close the job.

Sources