# Industrial Flooring Epoxy Quotation Software
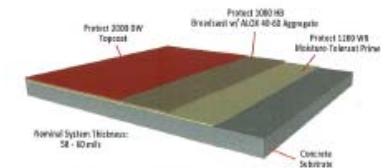
# Top level goals

- Project goals:
  - Reduce or eliminate errors in quoting flooring systems
    - Jason's contractors sell $2M to $12M dollars per year in flooring epoxy systems each
    - Previously, a single quoting error has cost up to $30,000
  - Streamline/simplify the quotation process, and communication between contractors and flooring system suppliers
  - Tangential benefit:  Improved ability to bring new sales reps up to speed
- First step:
  - A single AJAX form for developing a web-based quote
  - Output web-based and PDF quote and bill of material

# Industrial Epoxy Flooring Systems

- The company where Jason works:
  - http://www.protectiveindustrialpolymers.com/
  - Jason's hyper-simplified view: "It's all dust and glue."
- Flooring systems
  - Each flooring system consists of multiple products, applied in layers, to achieve a specific purpose (durability, chemical resistance, anti-static, etc.)
- Product layers
  - Each product layer is composed of different compounds
  - Each product layer is applied in a specific thickness
- Compounds
  - Compounds are the base materials that are ordered, mixed and applied by the contractors for each project
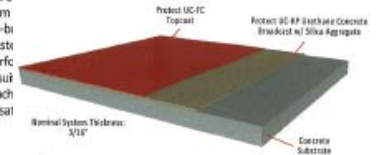
# Industrial Epoxy Flooring Systems

- Flooring systems
  - 3 example Inhibiwear systems
- Product layers
  - Systems shown have 4, 3, and 5 layers shown by color
- Compounds
  - Compounds are not shown
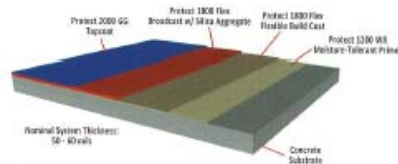  - Different ratios of compounds make up each layer

# Current Quoting Process

- Contractors discuss flooring options/requirements with the end customer
- End customers generally consider breaking a project up into multiple parts for budget or business reasons (e.g. Don't close all sitting areas)
- The contractor will often quote 2 or maybe 3 flooring system options for each area for the customer to choose between
- The contractor may also quote doing multiple areas at the same time to save labor costs
- There is also communication regarding the quote and flooring products are also discussed between the contractor and Protective Industrial Polymers (Jason)
- This is currently a slew of back of the envelope calculations, pictures, and Evernote

Coffee Shop Example
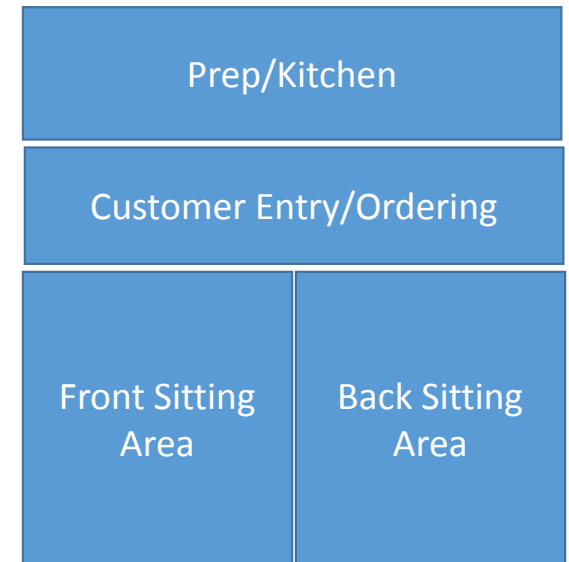
| Prep/Kitchen | |
|:---:|:---:|
| Customer Entry/Ordering | |
| Front Sitting Area | Back Sitting Area |

# Step 1 – Simplified Example Quotation Form

**Coffee Shop Example (Name of Project)**

**Prep/Kitchen (Area 1)**
Labor:

| Man Hours | Equipment | Travel |

Inhibiwear 1:

| Product 1 | Thickness | Sq Feet |
| Product 2 | Thickness | Sq Feet |
| Product 3 | Thickness | Sq Feet |

Inhibiwear 2:

| Product 1 | Thickness | Sq Feet |
| Product 2 | Thickness | Sq Feet |

[ Add Labor Button ]  [ Add System Button ]

**Prep/Kitchen (Area 1)**
Labor:
Inhibiwear 1:

| Man Hours | Equipment | Travel |
| Product 2 | Thickness | Sq Feet |

[ Add Labor Button ]  [ Add System Button ]

[ Add Area Button ]

## Coffee Shop Example

**Prep/Kitchen**

**Customer Entry/Ordering**

**Front Sitting Area** | **Back Sitting Area**

# Step 1 – Simplified Example Quotation Form

Coffee Shop Example (Name of Project)

Prep/Kitchen (Area 1)
Labor:
Inhibiwear 1:

Inhibiwear 2:

Prep/Kitchen (Area 1)
Labor:
Inhibiwear 1:

Project Quote:
Duration Estimate
Labor Estimate
Material Estimate

Bill of Material:
Description of job
Flooring system
Compounds required

# Essential Functions

- Rapid quotation tool
  - Easy to use form
  - Quotation tool is pre-configured with flooring system layers, default thicknesses, and the compounds required
  - Select system, enter square footage, get cost options and bill of materials
  - Ask good questions for common mistakes made by contractors
  - Potentially change default thicknesses and cost based on the contractor doing the quote
- User management will be required
  - Web administrators
    - Full access
  - Protective Industrial Polymer users
    - Configure flooring systems, product compositions, costs
  - Contractors
    - Create quotes, retrieve historical quote information, send quotes to customers and Protective Industrial Polymers for discussion

# Other Functions

- Integrate material stock for compounds already on hand
- Include the ability to attach pictures to quotes
- Integrate quotation tool with CRM software (possibly Prosper Works)
- Configure the tool for other industries
  - Paint, windows, doors, etc

# Possible Rollout Plan

- Rev Beta: Rough rapid quoting
  - Quotation mock up (Flooring systems with some coverage in sq ft/gallon and some number of products, mock up compound ratios)
  - Flooring system database interface
  - Example web-based and PDF quote output and bill of material output
  - User interface discussions, hash out functional needs

- Rev -: User management, quote storage, etc.
  - Work out user management and permissions system
  - Define any interfaces to the contractor purchasing systems
  - Notification options (email/text quotes or job status)
  - While this is being completed the databased of actual Protective Industrial Polymer flooring systems can be populated

- Rev A: Addition of features
  - Pictures within quotes
  - CRM (Prosper Works Integration)
  - Evernote type look/feel