Facilitate.org
Roofing BY Homeowners

Workflow and Subsequent Document Requirements

Customer's methods to engage with Facilitate

- facilitate.org
    - Instant Estimate (Roofle)
    - Email
    - Chat
    - Phone
    - Text
        - Upon completion of "inquiry" by the customer through any of the above channels, the customer is a LEAD.

LEAD

- The Lead is assigned to a Project Manager.
    - Upon assignment of Lead to a PM, the customer status is an OPPORTUNITY.

OPPORTUNITY

- Upon receipt of the opportunity by the PM, the customer is contacted and
    - Facilitate's Purpose, Processes and Instructions are explained to the customer with all customer questions being answered.
    - A **"Needs Analysis"** is completed by the PM.
        - Ensure the type of roof and the need for a full replacement is confirmed.
        - The timeline for the replacement is identified.
        - The existence of an insurance claim and the claim's status is confirmed.
            - Filed, inspected and ACV funded
            - Filed, denied.
            - Filed, not inspected yet by the carrier.
            - No claim, Out of Pocket purchase.
        - The financial capability for the purchase is confirmed.
            - The Roofle estimate will drive this confirmation prior to measurements being ordered or a physical inspection being done.
            - If financing is needed, the application process is completed and approval is verified.
                - A funded claim may require financing to cover the cost until reimbursed by the carrier.
        - Other trades being of potential service are identified.
            - Gutters / Downspouts/Leaf Screens
            - Painting
            - Siding

        - Garage Doors
        - Windows / Glazing / Glazing Bead
            - This information is documented and reviewed by the territory's Regional Project Manager for appropriation to the proper trade division for engagement.
    - Needs Analysis Results
        - Current Opportunity- The Opportunity is ready to buy.
            - Ready to Buy Opportunities require;
                - **Pictometry Measurements** - The PM invoices the customer for the cost of the report. Upon payment, the PM orders the measurements from Roofr or Eagleview. Either of these accounts are Facilitate Accounts and tracking of orders by Project Managers is necessary. **This flow requires information from the vendors on how best to set up. Facilitate wants ALL data and one large Facilitate account may provide a discount.*
                - **Project Manager Inspection Report-** The PM will physically inspect the home and complete a template checklist that is the same as the Installer Inspection Report.
                    - Confirm there is no other requisite work required to complete the roof to standard, ie…rotten fascia, chimney flashing work, exposed soffit, increased landscape / swimming pool protection, special material loading considerations, increased drive time, add ons like skylight work.
                    - Photos of the property and the additional items are to be taken and uploaded to the Inspection Photos folder at Facilitate.

                - **Installer's Inspection Report** - Confirm there is no other requisite work required to complete the roof to standard, ie…rotten fascia, chimney flashing work, exposed soffit, increased landscape / swimming pool protection, special material loading considerations, increased drive time, add ons like skylight work, drip edge NOT to be replaced because it is custom painted to match their fascia. (this is a customer decision), deleting any non-functional roof penetration flashings.

- A digital On Site Inspection document will be provided to the Installer's representative for completion and submission back to Facilitate. It will include a template list of items for the representative to check as Required Additional work and a dollar amount for cost to complete said work. The document will total the cost of all items.
- Photos of the property and the additional items are to be taken and uploaded to the Inspection Photos folder at Facilitate.

- **Labor Order** - Installer representatives must review / inspect the home and confirm;
    - acceptance of Faciitate's database, per square foot pricing as acceptable.
    - Include any expenses to be added from the Inspection Report to the Labor Order.
- **Material Order** -
    - SRS Building Supply and their Roof Hub ordering platform generates an "Estimate" that is the material cost to the penny, including sales tax.
- **Project Manager Order** - The cost of the Project Management for this project.
- **Facilitate Platform Fee Order** - The cost of Facilitate's fee to the customer.
- **Financing Order** - If financing is a component, the approval from the lender and relevant documents.

                - **Warranty Sample** - A sample of the workmanship warranty will be provided to the customer.
                - **Certificate of Insurance (COI)** - Both the Project Manager and the Installer must have their proof of insurance on file and will be shared with the Opportunities on a per job basis.
                - **<u>Proposal</u>** - Upon procurement of the above items, all are to be presented in a proposal to the Opportunity by the PM for approval.
                    - The Proposal includes all legal language that indemnifies Facilitate from any and all potential litigation or disputes that may arise in the process of the build or from any workmanship / material defects discovered post installation. This is a Docusign proposal with initials and signature requirements.
                    - **<u>Invoices</u>** - Acceptance of the Proposal prompts the sending of the Facilitate Invoice and the Material Order Invoice. Upon payment of the invoices, the PM can move the ***Opportunity to Customer.***

        - **Quoted Opportunity** - The Opportunity needs more time and is sent to the Latent Opportunity list and calendar with notes and a set follow up time.
            - This will entail a Thank You email to the customer and the scheduled follow up date with an embedded “Ready Now” button that will contact the PM when the Opportunity clicks it.

- **<u>Customer Status</u>** -
    - All Opportunity documents are stored in the Documents folder.
    - The Customer status is moved to Production.
        - **Notification email** to the Installer.
            - Set up scheduling on a shared calendar.

- The Customer receives a **Welcome email** from Facilitate and it includes “what to expect during your build” information that advises on vehicle placement, fragile items hanging from walls warning, securing your pets etc.
- Pre-Roof work scheduling - If any of the work found in the inspection work requires execution prior to the roof replacement, these items must be scheduled and completed prior to the delivery of the roofing materials.
- Roofing Material Delivery Confirmation - The PM will schedule the delivery date and this will be posted on the calendar.
- Build Date - The PM will schedule the date of the installation and this will be posted on the shared calendar.
- Customer Production Dates Acceptance - A template document with the above items and dates will be populated and emailed to the customer by the PM for approval from the customer.

■ **<u>PRODUCTION-</u>**