

SAMPLE WORK FLOW CHART

TASK	DESCRIPTION	SPECIFIC STEPS	SYSTEMS NEEDED	DOCUMENTATION	ACCOUNTABILITY	KPI's
WHAT IS THE TASK?	WHAT IS INVOLVED?	What SPECIFIC STEPS are required to execute the task?	What SYSTEMS will support implementation of the steps?	What DOCUMENTATION will support the steps?	ROLE / WHO IS RESPONSIBLE, accountability	KPIs / WAYS OF MEASURING SUCCESS
Outside Sales						
[+ several more marketing & sales steps, then....]	Networking e.g. Chamber of Commerce, professional associations. Market research. Cold calls. Warm calls. Referral marketing.	Develop lead list (cold or warm) Nurture top-20 clients. Call one top-20 once every 3 weeks. Review and analyze opportunities. Join X association to receive auto updates.	CRM Tasks & reminders. Systematic review of proposal sites. Join local Construction Associations. Join LinkedIn Construction Groups.	Input contacts in single system. Record every interaction Tag: A. Clients. B. Referral Partners/Alliances e.g. homebuilders.	Business Developer Office Manager	Number of new leads in pipeline. Number of initial meetings. Number of follow-up calls to former clients. Number of closed sales.
Project Mgmt						
Collect drawings - client	Save drawings into master folder	Save onto server or DropBox	DropBox, server, paper filing cabinet	Create client specific file, emailed drawings go into file	Office Manager	Number of drawings collected
Qualify job – good for us? Size? Scope?	Review drawings to ensure accuracy	Evaluate type of client If returning customer, considered good client? Margins for job size Location Schedule Min \$ value (smaller jobs)	Written protocol, documented & organized Flow chart with defined items Checklist Score list	Written protocol, documented & organized Flow chart with defined items Checklist Score list	Office Manager Business Developer	Client Suitability (Score compared with “Perfect” Client.) Number of clients scoring 8-10 on our scale.
Assign to project estimator	Based on scope & availability of staff	Email & verbal communication Tag lead in database	Email Enter into database	Paper file DropBox file	Office Manager	# new files opened per month