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## WINTER PROFITS OFFICE PROCEDURES HELP DOCUMENT



# Winter Profits Office Procedures

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## Estimating a Job from the Office

#### Getting Started with the Estimate Worksheet

Upon opening the worksheet, you will need to allow Macros to run. On the yellow Message Bar Excel displays at the top of the spread sheet, click Enable Macros. The worksheet will not run correctly without these permissions. The application is Protected so that no inadvertent changes are made. It will be necessary to 'Unprotect' the document so that you can update the values in the pricing tables. There is no password necessary to do this, simply click 'Unprotect Sheet' in the Review section of the Excel ribbon. Be sure to save your file after you update your inputs to retain your changes. When this is done, protect the sheet once again. The macros in the application will also protect the sheet during use.

#### Your Company Logo

You will want to replace the generic company logo with your company's logo. To do this, right click on the generic logo and choose 'Change Image'. Then in the file browser dialogue window, navigate to your company's logo and double click to insert the correct image. Be sure to save the file to retain changes.

## **Customize Your Pricing and Inputs**

#### **Pricing Table**

Once you have completed the Winter Profits Pricing Worksheets and have your pricing determined, you will need to customize the worksheet by entering your values in the Pricing Table. This table is found in the Values Tab of the application.

(Note: it is important that you do not alter any cell value accept in the price or feet columns of the tables. Altering the heading column will result in errors in the worksheet)

<u>Pricing Levels</u>: Replace the 1st Year and 2nd Year values for each of the Pricing Levels currently in the table with your company pricing.

<u>Refit Fee:</u> Enter a Refit Fee. A Refit Fee is a flat fee for customers wanting to refit and install lights from a previous house on a new property. This fee is only applied the first year. (If your company does not charge to refit lights to a new property, simply leave the cell blank.)

Mini-Strand Price: Enter the price you will charge per mini-strand of lights used on trees and columns.

#### Measurement Multiplier Table

The next table is for values used in measurement calculations. In the calculation tables of the worksheet there are cells to indicate the number of small, medium and large peaks for each side of the house. For instance, on a common simple gabled roof the roof-edge on the side of the house (the rake edge) is considered a large peak. There may also be a smaller gable over a garage, or an even smaller one over a window. The values in this table determine the number of feet that will be added to the total to account for the slope of those gables. This is going to vary somewhat depending on the pitch of these gables, but an average can be used to get a fairly close estimate. If you choose, you may alter those averages by entering new figures in the table. Be sure to save your file when you are through to keep your changes.

<u>Gable Roof Multiplier</u>: The first 3 rows in the Measurement Multiplier Table are for the additional feet added to the total to account for the slope of the gable. Enter a value in the feet column to be used for a small (Sm), medium (Md) and (Lg) gable.

Mini-Strand: Enter the length in feet of the mini-strands that you will use for trees and pillars.

<u>Tight & Regular Wrap</u>: This number will determine the different price for branch wrapping a tree or wrapping a pillar densely (Tight) or less densely (Regular). The number determines how many wraps on a trunk or pillar per

foot. Therefor a '3' entered in this column means that the estimate figures 3 wraps around a trunk in a foot of length, or a wrap every 2 inches (12/6 = 2). You may modify these inputs if you choose.

#### **Software Tools**

You will need to use the following applications to create and estimate from the office:

- Snipping tool such as the one that comes preinstalled as a Windows accessory.
- Simple photo editor in which you can crop and draw lines, such as Paint
- Satellite mapping application, such as the free version of Google Earth
- The Winter Profits Estimate Worksheet

#### Find and Capture Image

Look up the property address in SA, Google Earth, County Assessor or other satellite Map software.

Prepare to begin an estimate by first finding the property on the satellite map. It is necessary to have a photo that shows the full sideview of all the sides of the house that are being estimated. This will allow you to see any peaks, gables or lower rooflines that could be obscured in an ariel view. Google Maps has a street view that will often be sufficient. Alternatively, a local assessor's office website may have a photo of the front of the house. Or, if the home has been sold recently a realtor listing may have a clearer image, sometimes of multiples sides and angles as well. Always verify you are looking at the correct house by finding a house number on the house or comparing it with an assessor's photo.

Using your Snipping Tool, capture the necessary view from the image and save the photo with a name consistent with your predetermined naming convention. Ex: Last Name, First name – Year in a single folder designated for estimate photos.

#### Fill out the Customer Profile Section

Begin by filling out the information in the Customer Summary Field. Choose your difficulty/pricing level from the drop-down menu. Select yes if this job will be a Refit and input the number of previous lights that the customer will be using. The Total Feet of Lights is non-editable. It is the sum of the rooflines selected.

#### **Calculation Tables**

Below the photo area are the calculation tables. Each header box summarizes the total measurement and pricing for each side of the house and lighting feature. The Header box is colored to coordinate with the mapping lines of the estimate photo that the customer will receive. Each lighting feature can be included or excluded from the final pricing by toggling the rectangular button in the Header box. When the rectangular Toggle button is colored it is included in the Total pricing. If the rectangle button is greyed out, it is excluded from the final pricing. Under the Roofline section of the Summary, a statement will appear indicating which rooflines are included in the pricing.

#### Rooflines

As you measure around the rooflines of the house using your measuring application, input the numbers in the cells. The spaces to the right are the cells for the number of small, medium or large gables for that side.

#### Columns

As you measure around the rooflines of the house using your measuring application, input the numbers in the cells. The spaces to the right are the cells for the number of small, medium or large gables for that side.

#### **Circle Wrapped Trees**

Input the quantity of trees, the canopy width and height. No trees are perfectly symmetrical. These figures will have to be an average or a best guess. The calculation will return a close ballpark. With any trees, it is a good idea to let the client know that this is an approximate figure.

#### **Branch Wrapped Trees**

Again, input the quantity of trees with the measurements entered for this section. The trunk height is the tree below the first branches; enter this in feet. Some trees have more than one trunk, the worksheet provides the opportunity to enter the number of trunks that you will be lighting. The number of branches also is the number that you plan to wrap, and the wrapped length is the distance of that branch you will wrap. Again, this will return a ballpark estimate. There are many variables the go along with branch wrapping trees.

#### Other

The other section is a completely custom section for you to add any other products and services along with the pricing.

#### Create Estimate Map from Photo

On the photo, draw lines along the rooflines showing where you have measured. Use a different color line, corresponding with the headers in the worksheet, for each side of the house, (*Ex: Red for the Front, Green for the Left, etc*) This will be a good way to indicate to the potential client how the estimate breaks down per side. They can see where the lights will be hung on their house and the cost for each section.

After you have saved your photo/s you may upload them to the estimate worksheet. Click the PLUS sign. You may then navigate to the folder and the image that you would like to include. Be sure that your photo is formatted to a common aspect ratio in order for it to fit well.

#### Refits

For a refit, create an estimate of the new house. On the estimate worksheet, choose "Yes" in the Refit option and input the number of feet of lights from the previous house. The worksheet will figure the 2nd year price on all the previous lights, and 1st year price on the number of new lights, and then add the refit fee from the Pricing Table of the Values tab.

#### **Finishing Up**

When you have completed your estimate and have your mapping photos added to your worksheet, you may print the estimate as a pdf to send to your prospective customer or keep for your records. To clear the form click the Clear Worksheet button at the top.

## Onboarding

#### **Convert Client and Create Package**

When a client or lead accepts an estimate, convert the lead and create the Christmas Light Package just as you would with any other Service Autopilot package. You will need to manually transfer the 1<sup>st</sup> Year, Return Year and other pricing into the jobs in the package.

#### Follow Up with the Client and Update Package with Information

You will need to get your client's bulb color choice and their scheduling timeframe preference. They can make their decision using the form if you are using the automation or you will need to communicate with them another way. Even if the client submits their preferences using the automated form, they will need to be contacted to get payment information. It is a good idea to get this during the onboarding process. Or it can be done at the scheduling time, using the Installation Scheduled automation. They will not be able to confirm their scheduled installation date without payment information. We recommend that you restrict the options for payment to a cash payment before installation or a credit card to be charged following installation. If the client has not submitted the bulb and scheduling preferences form, that information will need to be gathered as well. Once you have these preferences noted, TAG the account with the appropriate scheduling timeframe tag and note the color preferences in the job notes of the 1<sup>st</sup> year Installation job for the installation crew to see. When the account has been updated

with this information, the TAG **Preferences Complete** needs to be added to prevent the Bulb and scheduling Preference form from being sent. If the **Preferences Complete** TAG is not added, the automation will run.

## Scheduling and Routing

#### Group Jobs by Area

At the beginning of the season, filter the waiting list by **Installation Time Frame** preference tag.

In the **Waiting List** with map filtered, visually figure geographical areas where all crews will work for each install day in the time frame. Leave room in the schedule for new jobs to be added. Select the jobs in a designated area and choose dispatch date using **Place Holder** as resource. When jobs are dispatched, automation to Email *Installation Scheduled* email to customer will run.

#### Route Each Crew for the Day

- The day prior to the date jobs have been dispatched, on **Dispatch Board**, group the jobs into separate routes for each crew. Keep routes as tight as possible and assign a Resource to each route.
- Include any Repair Jobs or Finish Jobs that are dispatched for the selected area.
- Filter by resource for the day chosen, set route order and choose Update Todays Route Only.

#### Tips for Routing Efficiently:

- Work backward toward shop or away from shop, depending on traffic times
- Consider which side of road job is on when determining order.
- Route trucks pulling trailers outside city centers when possible and use vehicles without trailers for more congested inner cities.
- If freezing temperatures are an issue, schedule North facing homes for later in the day, and South facing homes earlier in the day.

## Storing the Lights

Crew taking down lights has labeled the tubs with Customer Name, address and number of bins for each property. When tubs are dropped off at the warehouse, check each bin and make sure that every *Take Down* job completed has a corresponding bin. Make sure that the information on the route sheets matches bins. Store the bins in alphabetical order.

Close out jobs on Service Autopilot if crew hasn't already done so on tablets and attach the take-down photo map from the app to the client's account.

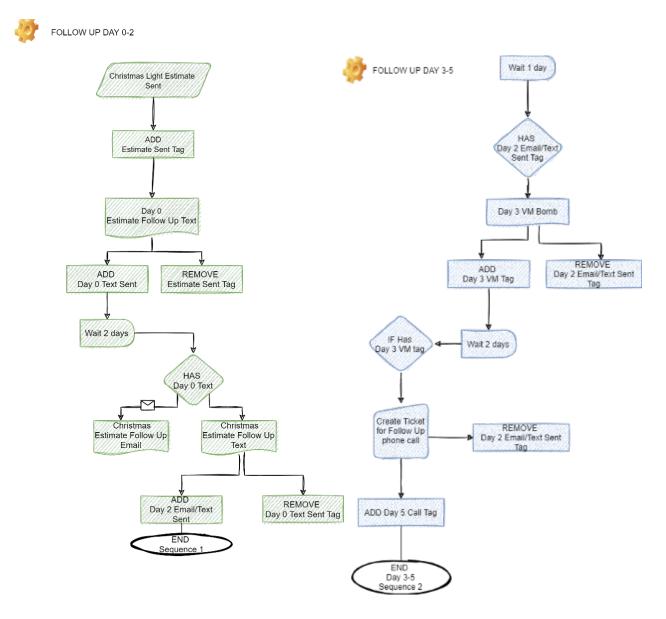
## Automations

Before using any of the automations, you will want to go through and assign the appropriate resource to tickets and alerts, adjust timing, and insert your company's logo into each document.

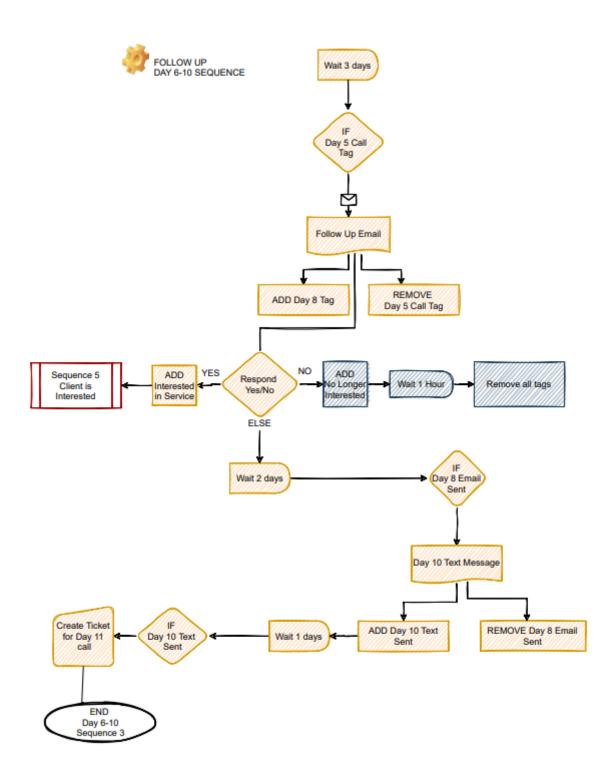
#### WP01 Estimate Follow Up

This automation is triggered when an estimate is sent. It is a 20-day series of text messages and emails following up with them every few days. It is important to choose an appropriate resource in each of the ticket events before using this automation.

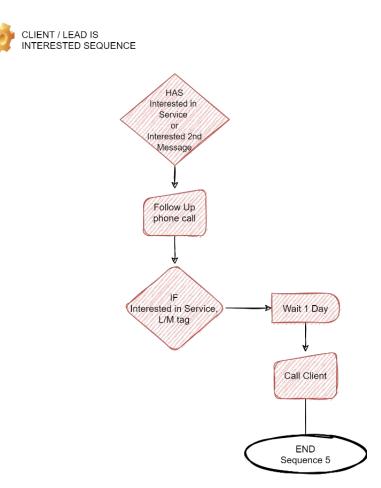
A text message is sent at the same time as the estimate alerting them to check their email. 2 days later an email and a text message are sent to follow up. 3 days later on day 5, a ticket is created for a CSR to contact the lead. The CSR may select the email link in the ticket, *Needs More Time*. This will add the *Needs More Time to Decide* TAG and delay the automation 4 more days before continuing with a text message, and then a ticket the next day for another phone contact. If the *Need More Time* email link is not selected, the automation progresses to the next sequence. When the Day 5 ticket is completed, a *Day 5 Call* TAG is added triggering the next sequence.



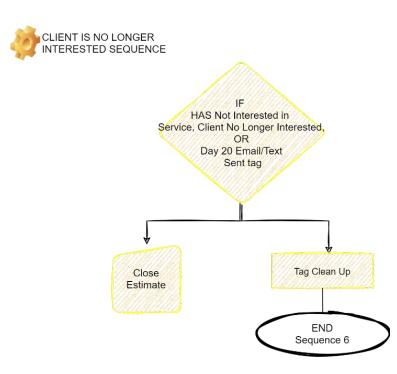
This begins with a 3-day delay before sending an email on Day 8. This email contains 3 email links for the recipient to choose: *Interested in Lights, No Longer Interested* in lights, or *I Need More Time* to consider. Each option triggers a separate sequence. After waiting 2 more days, a **Day 10 Text** message will be sent to the lead and the account will be tagged. It then waits another day before creating another ticket for a phone call.



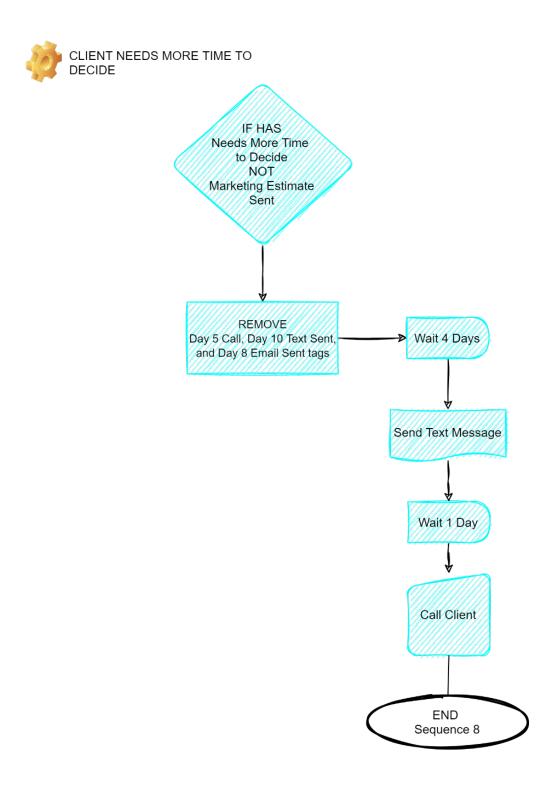
If the lead responds Interested in Lights, the account is tagged and a ticket is created for a CSR to contact them.



If the lead responds *No Longer Interested*, a ticket is created to mark the estimate as lost and Tags are removed.

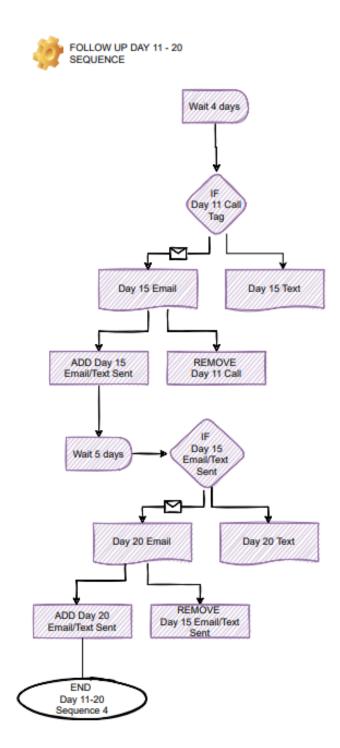


A *Need More Time* selection will tag and trigger the sequence described above. If no email link is selected the automation continues.



This will then send the automation to the final sequence which begins with a **Day 15 email**. This email informs the lead that their estimate will close soon and offers the email links described in the previous sequence. A text message is also sent and the account is tagged. In 5 days, a final **Day 20 email** and text message are sent, the account is tagged and if there is no further activity, the **No Longer Interested**\_sequence is triggered.

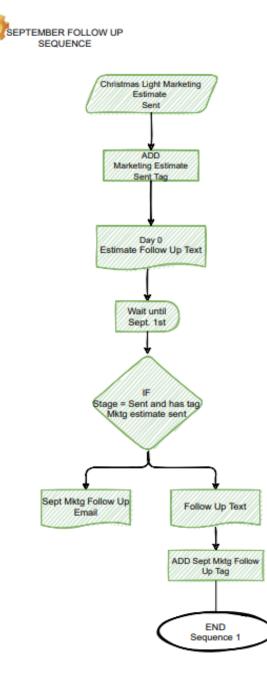
If the estimate is marked *Won*, the tags are removed from the account and the automation sequence is stopped. The account then enters the On Boarding Automation.



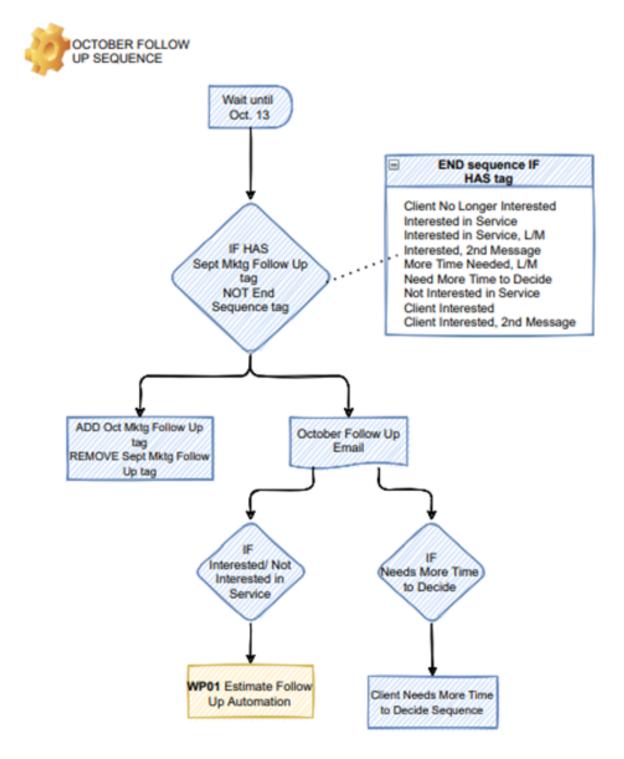
#### WP01.2 Existing Client Marketing Estimate Follow Up

Winter Profits has designed an automation to follow-up on a Christmas in July promotion to cross-sell your existing customers. It employs a less aggressive follow up regimen then the standard WP01 Estimate Follow-up automation. Be sure to look over the timing triggers and customize those to your business and edit each Ticket Event in the automation with the appropriate employee to whom the ticket is assigned.

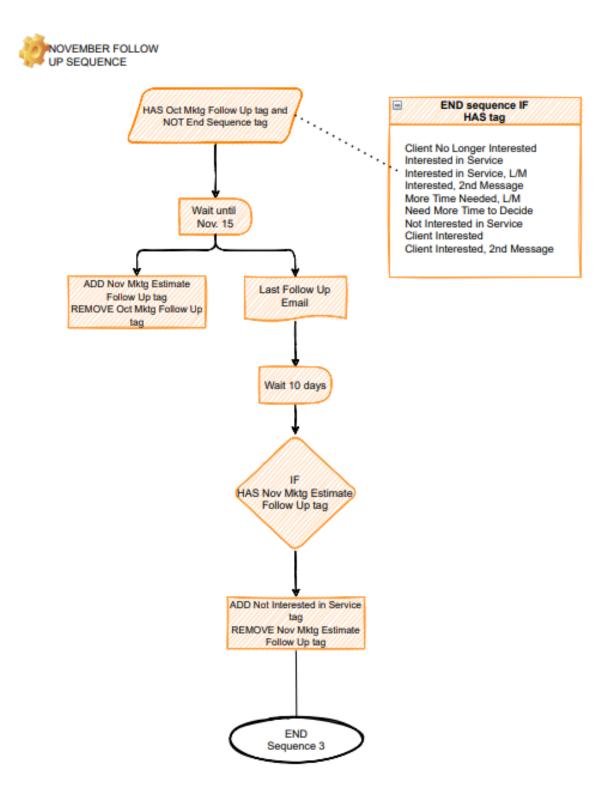
The automation is triggered when a Christmas Light Estimate is sent to an account that has the **Marketing Estimate** TAG. It begins with a Text message immediately following the estimate to notify the client that an estimate has been sent. It then waits until the first of September with the follow up begins with an email reminding the client that the holiday season is approaching and that there is still time to schedule in October to take advantage of the October installation discount. A text message is sent at the same time. Once these messages are sent, a *Sept Mktg Follow Up* TAG is added which will trigger the next follow-up sequence.



The next sequence is triggered by the **Sept Mktg Follow Up** TAG. It waits for the October date to send a form email asking the client to respond. The **Sept Mktg Follow-up** TAG is then removed, and **Oct Mktg Follow-Up** TAG is added. The email provides 3 responses: **Interested in Lights, Not Interested** in lights, or **I Need More Time** to consider. Both the **Interested in Lights** and **Not Interested** responses will enter the standard **WP01** Estimate Follow-up automation and trigger the corresponding sequence. For this reason, the Marketing Estimate Follow-up is NOT a stand-alone automation. It is necessary that both automations are running.



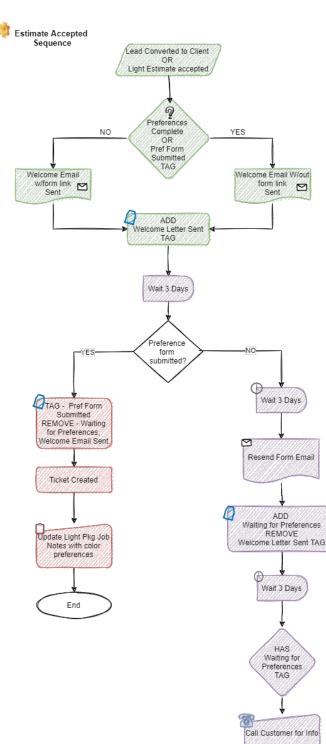
The final sequence is triggered by the *Oct Mktg Follow Up* TAG. If the client does not respond to the form email, they will be entered into another follow up sequence. One last email will be sent in the middle of November.



#### WP02 Onboarding

(Before using this automation, be sure to assign the appropriate employee to the Alert and the Ticket events as well as have a custom field set up in Service Auto Pilot called 'Xmas Other Notes'.)

End



#### ONBOARD AUTOMATION FLOW

When a client accepts an estimate, or a new Christmas Light package is created an automation is triggered which will send the client a Welcome Letter thanking him and providing him with your company's contact information. If the account does not have the TAG **Preferences Complete**, the Welcome Letter will include a form link for your client to submit with both their bulb preferences and their preferred installation timeframe. The bulb color choice has been mapped to a custom field called Xmas Other Notes, so be sure to have that custom field set up in Service Auto Pilot before you use this automation. The alert will prompt the selected employee to update the lead or client's account.

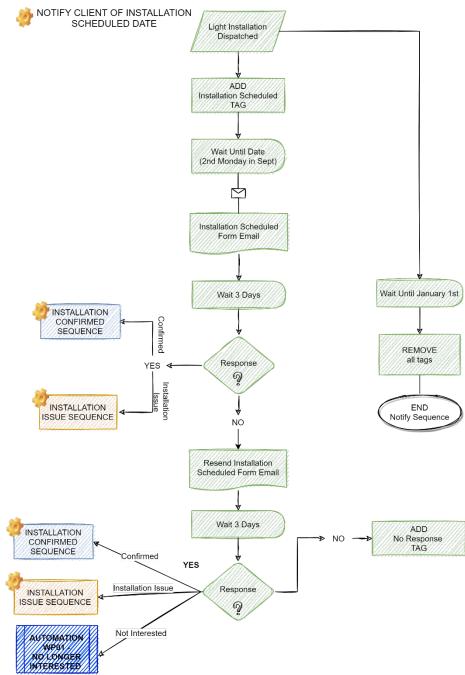
If the client does not submit the form and the information is not obtained in any other way (indicated by the absence of the TAG **Preferences Complete**), a waiting period will occur before the form will be re-sent to the client. If the client still does not submit the form or contact the office with the information, a Ticket will be created to contact the client by phone. This follow-up sequence looks for the TAG **Preferences Complete** before it runs. Because of this it is important that, if the information is obtained by any method, the TAG is manually added to the client's account. Otherwise, the follow-up automation will continue to run.

#### WP03 Installation Notification

(Before using this automation, be sure to assign the appropriate employee to the Ticket events and customize the timing of each notification according to your business model)

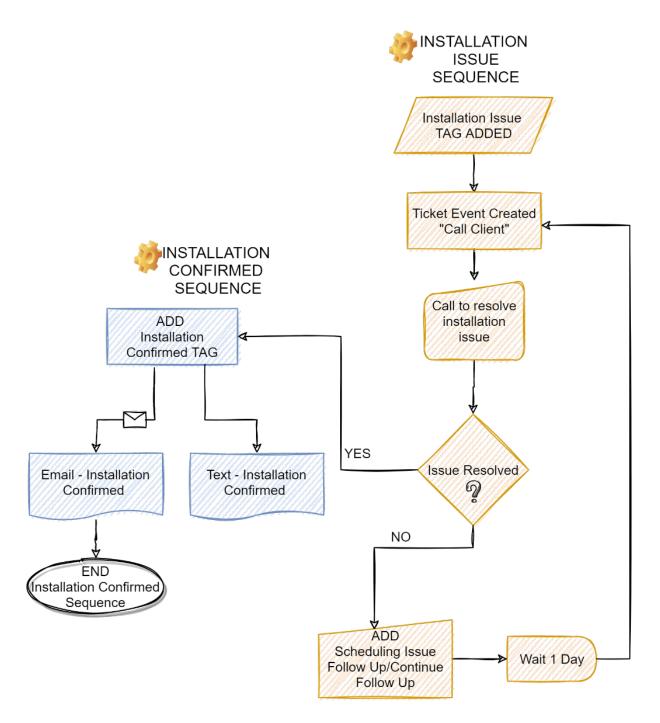
When a light installation job is dispatched, it triggers this automation. It then waits for the 2<sup>nd</sup> Tuesday in September, or a date you specify, before sending the Installation scheduled email which contains a form link for the client to, 1- confirm their scheduled date by providing their credit card information, or 2-request to be contacted to reschedule, or 3- notify of their intent not to install lights this year.

The automation includes a follow up process for clients that do not initially submit their form. After approximately 2 weeks, if the customer has not responded, a ticket is created to remove the job from the schedule. When the client chooses "**Confirm Installation**," the account is tagged and the customer is sent a confirmation text and an email.



When the client chooses "**Confirm Installation**," the account is tagged and the customer is sent a confirmation text and an email.

When the client responds in the form that he would like to be contacted, a ticket is created for a CSR to follow up with the client. Sequence is ended when the client is confirmed, or the job is cancelled or the client status changes to former.



#### WP04 Lights Installed

This automation is triggered when the installation job is completed. It sends a notice and thank you to the client. It then waits until December 15 to send a Merry Christmas email which contains a survey form asking for the client feedback.

