

General

May apply to various departments

1. The principals as set forth in our SHARED VALUES are abided by.
2. We proactively manage expectations so that we can meet and exceed them.
3. Maintain a minimum of weekly contact with each customer.
4. All calls and inquiries are answered and/or resolved the same business day.
5. 24 hour / 7 day a week emergency service is provided within 2 hours of contact.
6. All job book files are maintained according to company guidelines and are thorough and accurate. All meaningful contacts and information is thoroughly documented in the system on an ongoing basis.

Project Management Best Practices

1. The principals as set forth in our SHARED VALUES and beliefs are abided by.
2. 24 hour / 7 day a week emergency service is provided within **INSERT** hours of contact.
3. Contact is made with the property **owner immediately** at the time of reported loss.
4. Property is inspected and reserves are set within **INSERT** hours of reported loss.
5. Thorough and accurate estimates are completed and submitted as follows:

a. losses < \$ INSERT	no more than INSERT working days
b. losses > \$ INSERT	no more than INSERT working days
c. H.O. upgrades	no more than INSERT working days (once outlined by HO and reserves are set within one business day)
d. Supplements, Changes	no more than INSERT working days
6. Work orders and Warranty requests are to be completed and submitted following the guidelines outlined in the Standard Operating Procedure (SOP Execution of Work/Warranty Requests).
7. Estimates are written and submitted based on the following guidelines:
8. All structure estimates, upgrades, and change orders go to contract in accordance with company guidelines and state law.

- a. Supplements are communicated to all appropriate parties and reserves are set within **INSERT** business days of discovery of need.
 - b. Reaching an AGREED PRICE with the adjuster is actively pursued by the Project Manager. Agreed Price is achieved before significant production of job commences. **Minimum of INSERT communications per INSERT is documented until AP is reached.**
- 9. A follow up call is made with the agent, **INSERT**, within **INSERT** working days of loss and must be documented in the system.
 - 10. A minimum of one biweekly contact with the property owner is maintained at all times.
 - 11. All job book files are maintained according to company guidelines and are thorough and accurate. All meaningful contacts and information is thoroughly documented in the system on an ongoing basis.
 - 12. An advance on emergencies and commercial claims over **\$INSERT** is always requested.
 - 13. All H.O. estimates or upgrades require a 1/3 deposit.
 - 14. All monies due are collected within **30 days** of completion of a job. All aspects of receivables are managed pro-actively.
 - 15. An average of **INSERT** gross profit is achieved on jobs.

INSERT PER JOB TYPE

- 16. Job progress and profitability is monitored on a continuous basis.
- 17. All phone calls and emails are returned the **same business day** as received.
- 18. *Returned customer surveys are to be emailed to Agents and Adjusters within one week of receiving them. The sent email should be copied and pasted into the system.*
- 19. System contact and job information must be continually updated accurately.
- 20. **Project Management updates should be maintained in real time and formal reports are to be completed with pertinent information on a weekly basis. The report should clearly address monies, percentages, production status, and any changes since the last report.**
- 21. **INSERT ADDITIONAL**

Production Management Best Practices

1. The principals as set forth in our SHARED VALUES are abided by.
2. 24 hour / 7 day a week emergency service is provided within 2 hours of contact.
3. All production files are maintained according to company guidelines and are thorough and accurate. All meaningful contacts and information is thoroughly documented on an ongoing basis.
- 4. Job schedule as set forth at commencement of job is adhered to.**
- 5. Keep updated on new technologies and processes.**
6. Maintain constant and effective communications with Project Managers, team, and customers.
 - a. A **minimum of weekly contact** is made with Team Leaders
 - b. A **minimum of weekly contact** is made with Project Managers
 - c. Communicate/Follow Up within **one business day** any production related inquiries: job, production, HR, resources
 - d. Address a follow up within three business days of receipt inquiries generated from the PM Report.**
- 7. Maintain and develop quality control processes.**
8. Produce jobs in adherence to:
 - a. Company profitability targets
 - b. Customer service expectations are met and/or exceeded.
 - c. Quality standards are met and or exceeded.
 - d. **INSERT**
9. Responsible for the efficient and effective management of resources and maintaining appropriate resources to facilitate production work.
 - a. Human resources including in-house and subcontractors
 - b. Equipment, machines, tools, and vehicles

c. Supplies and materials

10. Provide appropriate support, tools, and materials to resources for successful deployment of any production activity.
11. Develop and provide leadership to production staff. Provide tools for growth and success of individuals.
12. Contact is made with property owner **within 24 hours** of production file submitted to production department from project management.
13. Production objectives and activity is managed within appropriate guidelines and schedules and resources are managed accordingly:
- 14. <\$5000: One week or less**
- 15. \$5000 -\$10,000: Two weeks or less**
- 16. \$10,000-\$30,000: One month or less**
- 17. \$30,000-\$100,000: 2 months or less**
- 18. >\$100,000: 3 months or less**
- 19. Commencement of jobs: All jobs are to begin production within one week or less from receipt of production file.**
20. Emergency services deployment: emergency services should be **facilitated immediately** upon notification. Resources will **be mobilized in 45 minutes or less.**
21. All customer/interested parties phone calls are returned within the same business day as received.

PRODUCTION JOB LEAD BEST PRACTICES

22. The principals as set forth in our SHARED VALUES are abided by.
23. Strive to meet or exceed all company expectations of a team leader.

24. Adheres to the Quality and Safety objectives on all job sites. Responsible for adherence to Quality and Safety objectives of assigned jobs. (Includes subcontractors and co-workers)
25. Ensures that work is executed and completed according to production scope or field lead sheet while meeting or exceeding profitability and efficiency targets per the scope or work order.
26. Communicate effectively with coworkers, customers, Project Managers and Production Managers.
27. **Immediately communicate** any meaningful information to Project Manager and/or Production Management accordingly. (*i.e. Special order items or things out of the ordinary*)
28. Maintain **a minimum of weekly** contact with each customer.
29. All calls and inquiries are answered and/or resolved the **same** business day.
- 30. Provide customer with a calendar and projected completion date.**
31. Documentation: Responsible to document on Meaningful Information regarding the job AND a **minimum of one weekly update**.
 - a. Meaningful includes but is not limited to: Communications regarding job, status changes, complexities.
 - b. Weekly Update:
 - i. Status of the job with specific next steps
 - ii. Complexities since prior update examples include but not limited to: job site restrictions, permits, approvals, property owner related, selections, resource limitations.
 - iii. Specifically confirm communication with property owner or main contact: Name, Type of Communication, Response: Example: Updated PO with schedule change and they are understanding.
32. Resource Scheduling: Assist Production Management in the preparation of the master schedule. Proactively help resolve scheduling conflicts. (Equipment, subcontractors and staff)

33. Critical Path is laid out in Company Job Management System.

- a. \$2,000.00 to \$12,000.00- two to three business days
- b. \$12,001.00 to \$50,000.00- three to four business days
- c. Greater than \$50,000.00- five to six business days

34. Critical Path is converted into schedule with dates and resources **within 5 days of inspection**

35. Job Scheduling: Prepare and communicate schedules of individual jobs as assigned. Communicate and adhere to schedules as set forth at the commencement of the job. As of job start date, written job calendars are to be submitted to Production Management to be placed into production file according to the following company scheduling and planning guidelines. **Not to exceed two weeks.**

- a. \$2,000.00 to \$12,000.00- one to two business days
- b. \$12,001.00 to \$50,000.00- two to three business days
- c. Greater than \$50,000.00- four to five business days

36. Review production scope and field lead sheets upon assignment. Communicate any need for changes or supplements within one business day to Project Manager or Production Management accordingly and document on scope of work order.

37. Production contacts **within 24-48 hours** to set up appointment for initial production inspection and meeting.

38. **Within 2-4 business days** (from time production book is turned in) scope is evaluated and job planning and scheduling commences

39. Initial Tasks and Trades are Laid Out

- a. Subs are scheduled or contacted and scheduled for site visit
- b. Material acquisition process begin
- c. **Within 5 Business Days** “basic” selections are initiated

40. Final Walk Through within 3 business days of completion.

41. Punch list completed within 5 days

- 42. All completed jobs over **\$30,000 require** Team Leader and Project Manager to meet to review scope/changes prior to closed job book being turned into Production. Meeting to take place **within 5 Business Days from COS being signed.**
- 43. Facilitate and assist in the training and development of staff.
- 44. Provide performance feedback of staff to Production Management.