<u>Project Manager Role and Responsibilities</u>

Goal: **Manage the bid phase from receipt of plans to contract to meet customer requirements of time, design, and budget**

General Tasks & Responsibilities:

1. Represent the best interests of production floor needs
   - Determine profitability & desirability of product mix
2. Accurately communicate client needs & requests to estimating
3. Turn profitable bids into contracts
4. Inform executive management of circumstances requiring attention
5. Effectively demonstrate & communicate strengths of our company to clients
6. Assist estimating in "blazing a trail" for job management to follow
7. Formulate & execute effective client contact & follow-up strategy

<u>I. Phase One: Pre-Bid Stage</u>

A. Conduct a preliminary assessment of plans prior to client qualification call
   1. Identify product groups
   2. Identify design issues & requirements
      a. Form intuitive questions to establish concern & credibility
         - Attachment
         - Installation
         - Durability
         - Style
         - Inconsistency or errors with catalog specifications
   3. Retrieve scheduled bid due date from the estimating schedule
   4. Return plans to estimator
      a. Let estimator know whether he should proceed or wait for further instructions

B. Qualification Call

   <u>Goal: To capture client requirements and begin establishing rapport</u>

   1. Introduce Role & Responsibilities
   2. Acknowledge receipt of plans
   3. Verify items to be bid
      a. What do they need
   4. Inform client of scheduled bid due date
      a. "Will that work for you?"
   5. Determine stage of project
   6. Determine when stone is needed on site
   7. Discuss customer design concerns
      a. Is SMP acceptable? Do you prefer custom
      b. Style?
      c. Bring up questions previously formulated to establish concern & credibility
   8. Try to find "hot spot"
      a. Time
      b. Quality

   c. Price
9. Determine who the decision maker is
10. Determine success of the call
    a. Should someone else manage?
    b. Do you need assistance?
    c. Does client seem interested?
11. Make a list of important issues to turn in to estimating
12. Review project with estimator
    a. Results of conversation with client
    b. Special concerns
    c. Discuss need for cpp's/Sam's workbook

II. Phase Two: Take-Off Stage

A. Receive input from estimator on design & technical issues identified during take-off

B. Relationship Building Call

Goal: To resolve questions generated from estimator

1. Discuss issues brought up by estimating periodically with client in order to establish credibility, concern, competence, & rapport
    a. Varying number of calls depending on project
    b. Utilize estimators in conference calls as required to expedite process
2. Points of Discussion
    a. Design modifications that reduce client costs
    b. Design embellishments that enhance project
    c. Technical or design issues that need clarification
    d. Verify specific needs in product groups

III. Phase Three: Bid Review

A. Receive completed bid from estimator
1. Review bid with estimator to gain understanding of line items
    a. Bring up points of concern
        - Inconsistency with client requests
        - Address price points & profitability (too high/too low?)
        - Customer notes
2. Begin determining profitability of project

B. Bid Complete Call
1. Notify client that bid is complete
2. Either conduct bid review or schedule for a later date

C. Bid Review Call

Goal: Assure we provide client with a bid consistent with their requests and requirements and effectively communicate that we have done so.

1. Re-confirm customer requirements captured in the qualification & relationship building calls
    a. Budget
    b. Custom needs
    c. SMP substitutions
    d. Areas where we deviated from drawings
    e. If cpp's are available some situations may warrant faxing them prior to bid review
    f. Verify all applicable areas are covered

g. Verify bid items & dimensions
2. Communicate necessary changes to estimator or make appropriate changes to bid
3. Send bid & cpp's if applicable
4. Complete all actions and schedule follow-up

IV. Phase Four: Follow-Up Stage

Goal: Turn bid into contract

A. Follow-up Call (this can involve multiple calls over a period of time)
   1. Check status of decision
   2. Find out if any new questions or issues have arisen
   3. Find out if bid was competitive
   4. Ask for the sale
   5. Identify obstacles to closing and overcome them
   6. Determine next follow-up
      a. Time
      b. Method (call, letter, postcard, e-mail)

B. Determine need for assistance from others
   1. Other project managers
   2. Estimating
   3. Drafting
   4. Executive

C. Communicate to estimators the need for re-bids, alternate bids, or optional bids

V. Phase Five: Bid Stage Complete

A. If we get contract…
   1. Call client and thank him
      a. Let him know what the next step is
         - Shop drawings
         - Job manager
      b. Let him know that you are always available
   2. Conference call to client with job manager when assigned

B. If we don't get contract…
   1. Find out who was awarded contract
      a. What did they offer that we did not?
         - Price
         - Delivery
         - Shipping
         - Comfort
      b. Verify if a contract has been signed
   2. Express interest in future projects