NECPA EXPO 2015 Presents

Shop Process Management
Shop Organization
Managing Information

- Initial Customer Contact
- Information Gathering
- Project Details
- Estimate
- Work order
- Fabrication
- Install/Completion
- Storing Information
Ask the Right Questions...

Basics—when where why and how...

First impressions are important. Be courteous and professional.

Find out if you are the right fit for this customer.

Set the expectations now—pricing, schedule, etc.

Take copious notes especially if you are not going to be meeting the customer for an initial appointment!
Information Gathering

Take the right tools to get the measurements you will need onsite

Bring any samples you may have to show the customer

Be aware of your surroundings and those of others onsite and their deadlines and expectations

Take Photos—digital, on phone

Keep consistency for the customer with a “point of contact person”
Project Details

Standardize your process

Keep your information in a data base or go directly into QuickBooks

Should the project be a go, make sure all items and notes are tagged for that customer so it can go into the workload

Keep employees working on the project updated on any detail changes
Estimates

Verbal—given over phone or in person at the location/shop

Written—mailed, faxed or delivered

Electronic—emailed pdf or other document
Work orders

How do you convert the estimate to a work order in your shop?

Do you take a deposit?

Timelines for action items—ordering fabrics, production times, fittings, etc.?

Who manages the work orders in the shop?

How do you find the information on the status on the work order should the customer call to “check in.”
Remember...

“The more often that information is passed the more likely that something will be misinterpreted or overlooked.”

T.F.
Fabrication

How does the work proceed through the shop...what is your shop “Flow”

Do you order fabric right away on jobs that are further down the list, or wait until they enter the build process?

Do you anticipate hang ups along the way and how do you trouble shoot these?

Are all parts of your shop working together well?
Install/Completion

Has the product been checked over fully and ready to go out of the shop?

Is your crew prepared with the right tools to do the job?

Is the install weather related and favorable conditions?

Has the customer been notified?

Are you dependent on others on the job site to have their parts completed before you get there? Discuss “Third party responsibilities”

Need Permits or Special Insurance riders?

Follow up with customer?
Storing Information

General Information Databases

Pattern Storage

Digital Storage

Fabric Storage

Reference Points—could you find the information in 2-5 years should you have to build it again?
In Summary...

Every shop is different, but having a consistent, organized system in place and clear lines of communication between all parties involved is the key to a successful working process.