

1

- Collect customer details
- Collect job details
- Enter into Fergus (job management system)

2

- Explain pricing terms (COD - Cash On Delivery for new customers and small jobs)
- Give estimate/budget over the phone
- Ask for photo (if it will be useful)

3a

- If smaller job: complete steps in 3a. If bigger job, follow steps in 3b instead.
- Book in time (with 1 hour window)
- Call or SMS when on the way
- Ask the customer if they are running late or something changes to please let you know
- If you are running late, call the customer directly

3b

- If bigger job: SMS on Sunday night to confirm

4

- Arrive onsite / Inspect
- Mention payment terms again

5

- Buy materials (if required)
- Use job address as reference with suppliers
- Enter photo of docket into Fergus

6

- Installation work incl. Remove rubbish

7

- Confirm work with customer before leaving (demonstrations, etc)
- Make sure they are happy

8

- Take payment and send invoice
- Send receipt (next day)

9

- SMS for next job
- If finishing earlier than expected, call owner with 1 hour notice.