

WORKFLOW

CX TEAM Team up for success – deliver a positive customer experience

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ACCOUNT MANAGER [AM] Account Owner, Relationship Builder, Opportunity Seeker, Solution Explorer, Closer,	ACCOUNT TEAM REP [ATR] Account Support, Relationship Builder, Account /Opportunity / Case Care, Solution Explorer
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TEAMWORK

Pleasant | Productive
respect, feedback, trust, gratitude

- AM does Discovery Call – asks questions, presents solutions, builds value, sets expectations – Logs Call
 - AM sends email, w/ attachment and required info to their specific accountteam@durabuiltwindows.com – or - calls ATR, with the required information;
 - 1. Account name 2. Product specs 3. Factor 4. Opportunity Name, Type, Stage and Close Date 5. Special instructions 6. Attachments
 - Auto-email sent with CASE number for tracking and follow up
 - ATR completes quote – or – requests more info
 - ATR CHATTER posts to AM in SF Opportunity and informs SALES that the quote is ready– or – sends directly to customer as directed by SALES
- 48-hour return on quotes – unless an earlier date is agreed upon

AM ensures ACCOUNT and CONTACT information is up to date

- Logs all Calls
- Sets up Tasks – Next Steps

Account Type – Volume Home Builder | ATR sets OPPORTUNITY information, AM manages

All Other Account Types – AM sets OPPORTUNITY information

Select Correct;

- Record Type – Single, Non-Forecast Quote, Account Monthly
- Type – Standard, Project or Project w/ installation
- Stage
- Close Date
- Amount

FEEDBACK

- AM provides feedback to ATR – changes, errors
- ATR produces revisions – or – AM completes
- AM presents to the ACCOUNT – or – follows up on the Quote
- Send Quote revisions to ATR – or – completes
- Reviews quote revisions w/ ACCOUNT
- Closes on the Opportunity

- AM reviews with ACCOUNT;
- Production Lead Times
 - Production Release | Job Site Delivery Infographic & Rack Delivery (if applicable)
 - Credit Terms
 - Existing ACCOUNT – Account Status
 - New ACCOUNT – Follow Credit Application WORKFLOW
 - Pre-Paid payment terms (B2C)

ORDER

- Follow Standard Order WORKFLOW

SHIPPING

- Per the Job Site Shipping WORKFLOW

CX ACCOUNTABILITY

Provide the best CX – eliminate errors (NC orders / Credits)

- Volume Home Builder, Manufactured Housing | ATR does double check of Quote before order submittal – coach ATR on errors
- Custom Home Builder, Contractor, Consumer | AM meets with client (F2F or Phone) reviews all lines, obtains sign off
 - Log F2F or Phone call Subject: Final quote review
- CX Dealer | Fully responsible for the Quote / Order submission
- Dealer – Durabuilt providing the quote | AM has up front conversation with dealer that they are responsible for reviewing the Quote / Order with their customer

CONNECT YOU

SERVICE

- SALES send emails to your specific connectyou@durabuiltwindows.com
- SALES to include pictures or other related information in the email
 - CONNECT YOU responsible for scheduling the Work Order and CASE completion

CASE inquiry

- SALES to review CASE information
- If addition information required – Chatter post in the CASE – include CASE owner name (@case owner name)
- CASE Owner to respond within 24 hours