

American Restoration, Inc.
JOB DESCRIPTION – TEAM LEADER

Purpose: To determine the duties and performance levels associated with selling and managing jobs as well as marketing for new work.

Overview: The following duties are included in your performance appraisal. The position of project manager is primarily accountable for writing accurate estimates, selling jobs and then managing the production so the jobs are completed profitably and in a timely manner. Project managers are also responsible for undertaking marketing activities that will lead to more work from current sources and new work from new sources.

- Estimating and Sales Duties
 - Writing accurate estimates: The following are details of an accurate estimate:
 - Complete and accurate listing of all items required to complete the repairs. Must also include all of the sub-components of the project (i.e. debris removal, R&I doors, masking, etc.)
 - Proper pricing related to the items that are required to complete the repairs. Pricing used for the unit cost entries should correspond to the cost of the materials and the labor required to properly complete the task listed plus a reasonable profit.
 - The estimate should not leave any unanswered questions. It should include notes and other details that provide a clear picture of all of the duties required to complete the job. It should also state what is not included in the repairs estimate if necessary.
 - Estimates should include opening statements that describe the cause and brief outline of the details of the loss.
 - Potential supplements and open items should be noted on the original estimate so that they are not a surprise to the property manager, adjuster or agent.
 - Proper file documentation
 - Pertinent phone calls with the adjuster, agent property manager, tenant or other concerned party should be written in the file. These should be dated and the important issues should be noted at the time of the conversation.
 - Paperwork should be complete and organized inside the file so that the information is easily accessed.
 - All signed correspondence from the adjuster or customer should be enclosed and easily accessed.

- Each file should be organized in the same manner so that information is easily accessed and complete.
- Organizational abilities
 - Must be able to manage multiple files and clients at a time. Should develop a system that assures that all clients receive the same exceptional service.
 - Should have a firm grasp of all estimates and jobs in production at any given time.
 - Should maintain a clean and orderly workspace and vehicle.
- Timely and complete communications with the office
 - Should update supervisor about the status of all jobs on a routine schedule – at least once per week.
 - Written and electronic correspondence should be returned within 24 hours of receipt.
 - Phone calls should be returned immediately.
 - Estimates should be submitted for approval as soon as they are complete.
 - All after-hours emergency calls should be returned within 15 minutes.
- Completing estimates on time – timely completion of estimates is essential for timely completion and payment of work. Additionally, agents and adjusters will appreciate the timeliness of the paperwork. When estimates cannot be accurately billed within expected time frames, consider leaving open items or potential supplements rather than delaying the estimate or bill. If estimates are not returned within these timelines, the customer and adjuster should be called with an update. Estimate/billing timelines:
 - Water damage emergencies – within 24 hours of completion of the emergency service.
 - Packouts – within 24 hours of completion of the packout and prior to cleaning.
 - Deodorization cleaning jobs – within 24 hours
 - Construction projects
 - <\$20,000 – within 24 hours
 - \$20,000 – \$40,000 – within 48 hours
 - >\$40,000 – within 72 hours
 - Roofing estimates – within 24 hours
- Closing ratio – this is the amount of estimates sold to the amount of jobs estimated. The higher the closing ratio, the more efficient your estimating time is being utilized. Variances in closing ratios are expected. It is understood that you may not want to work on every job that you estimate. You should use discretion in turning down some work as the risk of completing the project exceeds the rewards in doing the work.
 - Expected closing ratio target should increase every year. Starting closing ratio should be over 60%.

- Collection responsibilities – Although the accounts receivable clerk will be taking care of the duties associated with collecting most projects, the project manager should take an active role making sure that the projects are collected within the parameters established during the estimate and approval process.
 - Expectations – Effective collections need to be managed and should receive attention on a weekly basis.
 - Timely invoices will speed collections considerably.
 - Emergency services should be billed as soon as they are complete.
 - Packouts should be billed within two days of completion of the packout and prior to the cleaning. These jobs should be paid in full prior to returning the contents.
 - Jobs over \$15,000 should have a draw schedule. Progress payments should be paid on time or the job shut down until payments are received.
 - Most payments should be received within 45 days of invoicing. After 30 days, every outstanding job should be worked on every week.
- Project Management Duties. The project manager will be accountable for producing the job efficiently and in a quality manner.
 - Job profitability – Producing jobs profitably depends on writing an accurate estimate, planning for profits and then implementing the production plan.
 - The following are the guidelines for acceptable profit margins:
 - Construction – 40%-45%
 - Fire Cleaning – 60%
 - Water damage emergency service – 70%
 - Roofing – 35%
 - Timely job completion.
 - Each job should have a production schedule. The production schedule should be timely and allow for a seamless production flow. Timely project completion creates cheerleader customers, speeds cash flow, allows adjusters to close files quicker and minimizes claims costs.
 - Production schedules should be put in writing and communicated and coordinated with the main office.
 - One of the key issues in timely completion of the job occurs prior to the project being started. The project manager should be aware of the following issues:
 - Properly setting the clients expectations in the following areas:
 - Likely start and likely completion time frames.
 - Draw policies
 - Client responsibilities
 - Details of the work to be completed

- Writing accurate, complete and timely estimates. Supplements should be minimized and timely.
 - Clear timely communications with the adjuster and/or agent.
 - Obtaining bids from subcontractors during the estimate process when necessary.
- Locating and utilizing subcontractors – subcontractor utilization is a key in maintaining a low overhead, creating a flexible production staff, planning profitability and timely completion of jobs. A small staff of production personnel should be used to maintain service levels, respond to emergency services, complete urgent tasks and punch list items and take care of tasks when subcontractors are not readily available. Subs should be utilized for general construction projects as well as specialty trades such as plumbing and electrical.
 - Locating subcontractors is a project that requires a time investment. When selecting subcontractors, qualify their pricing to make sure that it fits within the level that we are allowed to pay. Also check references to qualify their service levels and quality of work.
 - Inspect job sites frequently when utilizing subcontractors to assure quality levels.
 - Contact customers daily to check on work quality, communications and job cleanliness.
- Efficient use of production employees
 - When using staff production personnel, materials and labor need to be carefully and precisely planned. Employees should either report directly to the job site, or spend less than 15 minutes at the shop prior to leaving for their assigned jobs.
 - Employees should be utilized on projects that they can efficiently produce. Labor should not be thrown on a job to keep busy. They should be able profitably produce a job with acceptable quality.
 - Labor expectations should be set in advance so the production personnel understand the expectations for project completion.
 - Clear written descriptions of the work to be completed should be produced every time you send workers to a job.
- Pre-planning jobs – materials, labor, etc.
 - Meeting expected profitability goals is dependent on properly planning projects. Labor and material inefficiencies will substantially lower realized profitability.
 - Materials should be delivered to the jobsite or the warehouse most of the time. Productive labor personnel should not be utilized to run materials on the way to or leaving from the jobsite.
 - Subcontractors should be efficiently scheduled so that production is seamless and so that trades are not stacked on top of each other.

- Progress payments, draws, customer selections should be scheduled so that there are not unnecessary delays in project completion.
- Marketing Duties
 - Developing relationships – in the restoration business, adjusters and agents work with contractors that they like. It is important that you develop a trusting relationship with your clients. This is accomplished through routine marketing, frequent and timely communications when completing a job, professional and timely paperwork and marketing activities. You should be doing the following to develop relationships with your clients:
 - Hand-deliver as many estimates, notification of completion, client comment cards and letters of recommendation as possible.
 - Hold lunch and/or coffee meetings
 - Become involved with community events and organizations
 - Be active in agent and adjuster associations
 - Follow up after a job is complete to make sure that they were happy with the way that you handled the claim.
 - Maintain a detailed journal for all current clients. This should detail information about each client and information on projects that you worked on together.
 - Prospecting and finding new sources of work – you are responsible for locating additional sources of work. The marketing representative and general advertising will bring work in the door, but you are expected to undertake marketing activities that will generate additional work sources. Marketing activities and expectations:
 - Make at least five marketing contacts every week. This will be a combination of new and old contacts.
 - Become involved in two industry associations (agent, adjuster, property manager, risk managers, etc.)
 - Your marketing contacts should account for 5 new work sources per year that send work on at least a monthly basis.
 - Consistently undertaking marketing activities – Many companies will only market when they are slow. This will lead to wide swings in work volume. Effective marketing is consistent and occurs independent of the sales.
 - A marketing log should be completed every week detailing all of the marketing contacts made during the week. There should be at least five contacts on the list every week.
 - Marketing contacts occurs whenever you meet with a past, current, or prospective client and ask for work.
 - Meeting sales goals:
 - The project managers and the general manager should set annual sales goals. The annual sales goals should be broke into monthly amounts.

- Sales numbers should be figured by totaling contracts signed, emergency billings complete and supplemental amounts during a given period of time.
 - Actual sales performance will be compared to monthly sales goals and progress towards the annual goals. Monthly amounts should carry less weight than progress towards accomplishment of annual goals.
- Leadership Duties
 - Ability to positively motivate others – As a manager, you are looked upon to be a positive and motivating force in the organization. You are responsible for the following:
 - Communicating a positive image of the company to the entire staff
 - Implementing the company vision and mission and achieving goals
 - Achieving superior performance from the entire staff and raising performance levels of anyone that is underachieving within your area of responsibility.
 - Develop skills of others – it is the responsibility of managers to make sure that the staff is developing their skills and becoming more valuable contributors to the overall success of the company.
 - Convey positive image of the company – your personal appearance, attitude and actions convey a message about the company. It is important that you plan and implement the message that you want to communicate. This is accomplished through the following:
 - Marketing efforts and marketing message.
 - Attitude
 - Appearance
 - Paperwork – timeliness, accuracy and appearance.
 - Make progress towards corporate vision – The company vision should be clearly communicated and when it is, you should make sure that your actions assist in accomplishment of this vision.
 - Develop your own personal vision. It should coincide with the corporate vision.
 - Progress toward implementation of the corporate vision should be clear and easily identifiable.
 - Perceived as strong leader by the staff – If you are perceived as a strong leader, the staff should be motivated by your example and they will be effective at implementing the company vision and assist in achieving both company and individual goals.
 - Provide valuable insight for improvements – as a manager in this company, you are expected to assist in solving problems and in making this a more effective organization. To that end, you should be actively involved in finding new solutions to existing problems.
- General Professionalism

- Personal appearance – your appearance is a direct reflection of the professionalism of our company. You should be aware of the following guidelines:
 - Business casual or business attire is recommended when representing the company. Use your discretion and dress appropriate to the situation.
 - When possible wear shirts with a company logo.
 - Either maintain well-groomed facial hair, or be clean-shaven.
 - Casual or dress slacks are preferred. If you wear jeans, make sure that they are not stained or ripped.
 - Carry a briefcase or other case to carry all computers, phone, pager, pen, pencil, camera, etc.
- Knowledge of the industry
 - Knowledge will come with experience; however you should actively seek out opportunities to expand your knowledge.
 - If you are new to the industry, it is essential that you undertake independent learning opportunities to bring your knowledge up to a level that will allow you to speak professionally to the clients, agents, adjusters and other employees.
 - If you are a seasoned veteran, you should be actively pursuing learning opportunities. You can never become complacent in your knowledge of the industry. It is expected that you make efforts to continue to increase your knowledge of the industry.
- Seeks information and knowledge of new issues – this includes both industry knowledge and management knowledge.
 - You will be provided opportunities to receive formal industry training. You should make yourself available for these opportunities.
 - If you want to grow in your position, you should read industry related information for at least 1 hour per week and ideally 2-3 hours per week. This should include Internet research and trade journals. Restoration is a dynamic industry with new information released every day. Your commitment to increasing your knowledge will dramatically increase your professionalism.
 - Business management and marketing information is readily available internally and externally. You should spend time tapping those resources to make yourself a more effective manager.
- Properly delegates and follows up on delegated tasks
 - Effective management requires you to utilize the resources of your personnel. Your ability to delegate appropriately will assure your success.
 - Are you delegating the appropriate tasks?
 - Are you delegating to the appropriate people?
 - Are you delegating too much?

- When you delegate, do you routinely follow up to make sure that the project is on target?
 - Follows company policies and procedures – the company has put a number of policies and procedures into writing and others exist informally.
 - Implementation of company policies and procedures will create a more effective and efficient organization. Defined roles and responsibilities will be completed properly when these policies and procedures are implemented across the board.
 - Do you seek out and implement existing policies and procedures?
 - If you don't like a current policy or procedure do you recommend a more practical approach?
 - Develops creative solutions to problems – you need to be a problem solver. When a challenge is encountered you will need to come up with creative and realistic solutions. It is important that you solve problems rather than bring them to your supervisor, as this will create an effective organization.
 - Seeks additional assignments and duties
 - You have a lot of duties in your current job description, however in a restoration business, many duties remain to be filled and others may have too much work to effectively complete. You will be asked to locate these additional responsibilities and develop creative solutions.
 - Turn in accurate and timely paperwork
 - Due to the fact that our company processes such a large amount of paperwork, a delay on your part could create a backlog of work. For this reason, paperwork needs to be processed daily.
 - Purchase orders need to be complete, accurate and turned in daily to assure accurate job costing.
 - Invoices and completed files should be turned in as soon as the job is completed.
 - Estimates need to be completed and processed through the appropriate channels.
- Customer service
 - Contributes to overall customer satisfaction – this is a real general item, but is the main mission of our organization. Our organization's goal is to create a cheerleader customer on every project.
 - As an estimator and project manager, you serve a major role in managing the customer's experience with our company. This includes the following:
 - Setting expectations prior to starting the work.
 - Timely communication.
 - Quick response to customer questions and concerns.
 - Visiting the job site to make sure that quality work is being completed and that the customer's needs are being met.
 - Following through on any commitments made.

- Customer communication – the key to creating a cheerleader customer is in maintaining timely and professional communications, before, during and after the work is complete. You cannot over communicate, especially on a residential project. On a commercial project, establish as much of the communication schedule in advance as possible. The following communication issues are essential to managing our customer’s experience with our company:
 - Project timelines – major milestones and projected completion dates.
 - Upcoming schedule.
 - Review of the work complete.
 - Details of the customer’s responsibilities in completing the project in a timely and professional manner (i.e. selections, payments, etc.).
 - Signed paperwork in a timely manner (i.e. – selection sheets, change orders, contracts, work authorization, etc.)
 - Any delays, or changes in schedule or specifications.
- Reaction to customer concerns – no matter when you are notified of any customer concerns, you should respond immediately. Even if you don’t have an answer to their concern, at least listen to their issue and then make a commitment to address their concerns at a specified time.
 - Any time that our clients have problems with our service, it is an opportunity to provide exceptional service. If we respond to their concerns in a timely and appropriate manner, it is a major moment of truth. Any delay in responding to their issues will be a major negative moment of truth.

Employee Signature

Date

President Signature

Date