



Sales enquiries and Order Processing

MSP 003

Issue 5

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Change History			
Date	Issue	Approved	Reason for Amendment
10/01/2014	1	SN	First issue
02/07/2015	2	SN	Amending procedure to correct issues raised in recent audits
17/09/2015	3	SN	Amended flow chart
07/03/2017	4	CH	Amending procedure to correct issues raised in the recent audits.
01-10-19	5	CH	Amend Section 4 and 7 to include proposed improvement changes to the production of the tender form (no longer using MSF 111 and now use the automatically generated document from Easybuild).

1. Purpose

This procedure defines the process Goody Demolition uses to control customer enquiries and sales orders and ensure customer contracts and services are set up and monitored in accordance with customer and legal requirements.

2. Scope

This procedure applies to all activities related to the control of sales enquiries and sales orders and the subsequent set up and monitoring of related services.

3. Responsibility

The Contracts Director is responsible for the implementation of this procedure.

4. References

- Prestart Meeting Checklist MSF 101
- Tender Form Generated by Easybuild
- Quotation template MSF 108
- Quotation Cover Letter Template MSF 112

5. Definitions

- 5.1. Contract Pre-Start Meeting: A meeting generally held on site to gather information to provide input into the job planning process.

6. Measurement of Process

- 6.1. The effectiveness of the enquiry process will be measured by the conversion rates of quotes to orders.
- 6.2. The effectiveness of the ordering process will be measured by monitoring the number of non-conformances identified against this procedure

7. Sales Enquiry process

- 7.1. Upon receipt of a sales enquiry the Administrator will open a new record in Easybuild and enter all the necessary information. Easybuild will automatically allocate a job number.
- 7.2. The Administrator will create a tender file identified by its job number which is generated by Easybuild.
- 7.3. The Assistant Estimator will then insert all relevant documents add a return date and PQQ programme. A tender form will be generated from Easybuild by Admin and added to the file. The tender file is then displayed on document holders in the Estimating office. Estimators will then pick which file they are going to work on.
- 7.4. The Administrator will also create an electronic folder on the server identified by the job number and add pictures, drawings and other relevant documents to the folder. The tender file shall then be passed to the appropriate estimator.
- 7.5. The Estimator will arrange with the customer a suitable date and time to visit the site to carry out a survey.
- 7.6. The Estimator will complete the tender document and produce a quotation for the work and add the documents to the tender file.
- 7.7. If the total value of the job is over £200,000 the tender file will be passed to the Contracts Director for review and approval. For lower value jobs the tender file will be passed directly to the Administrator.
- 7.8. The Administrator will update Easybuild and link all new and completed documents to the record. They will then type a formal quotation and send it to the customer.
- 7.9. The Estimator will at suitable intervals follow up the enquiry to ascertain the level of interest.

- 7.10. Upon confirmation of 'WIN' or 'LOSE' the job the Assistant Estimator or member of Admin will update the site status field of the Easybuild record to indicate 'WON' or 'DID NOT WIN' and record the details of the job on the whiteboard in the office. All won jobs will be notified to the Contracts Director.
8. **Order processing**
- 8.1. Once a job has been won Easybuild will allocate a unique job number converting the enquiry to an order.
- 8.2. Once an order has been received the Contracts Director and Surveyor or Estimator will arrange to visit the site for a pre contract meeting.
- 8.3. A Pre-Start Meeting Form should be completed.
9. **Variations**
- 9.1. Upon receipt of a variation from the customer, the requirements will be reviewed by the Quantity Surveyor and, taking into account the progress of the original order, the implications of any legal requirements and the scheduled completion date. The customer will be contacted if any of the requirements cannot be met
- 9.2. The Managing Director will determine the extent of the work involved in meeting the requirements of the variation and if it can be met within the existing scope of the project. A new quotation may be required and shall be processed in accordance with section 7.0 above
- 9.3. Upon agreement of any amendment the Operations Manager must be informed of the required changes if the original order has been previously marked as 'WON'
10. **Application for payment**
- 10.1. Upon receipt of an email notification from Easybuild that a job is complete, the quantity surveyor will raise an application for payment in accordance with the agreed terms and conditions.
- 10.2. The application for payment is then printed and passed to the administration office who will update Easybuild with the payment application details and produce a covering letter. This will be attached the application for payment and passed back to the Quantity Surveyor.
- 10.3. The quantity Surveyor will check and sign the covering letter and pass it back to the Administration Office to send to the appropriate contact and address for payment.

11. Flowchart

