

## Role of the Estimator/Sales Person

- Develop a process for getting Requests for Proposals and follow it diligently.
- Use a contact management program and keep it updated
- Work with your team to generate sales leads
- Represent your company to the client, his representatives and others that you will interact with in a professional manner. Focus on both the technical and business aspects of your work
- Follow up on leads and referrals in a timely manner
- Make sales presentations to prospective customers
- Make follow-up call to customer on completion of the project
- Have an effective management process from the initial enquiry to the hand over to the field.
- Administer the contractual aspects of the project bidding process to maximize profitability and minimize risk.
- Assesses projects and prepares bids for tender and negotiation based on customer specifications.
- Prepares or reads drawings and all pertinent data in order to prepare proposal.
- Develops the execution plan for all proposals.
- Make sure that all information flows to the appropriate people in a timely manner.
- Ensures that all customer complaints are addressed promptly and in a fair and objective manner.
- Assists in collection of disputed customer accounts.
- Adheres to Company policies including but not limited to professionalism and safety.
- Has minimum absenteeism and arrives at appointments promptly.
- Completes work within expected periods of time.
- Performs other tasks as assigned
- Analyzes profitability of customers and projects.

## **Checklist of duties**

- Bid information form: This is completed by the person receiving the enquiry and passed to the estimator/sales person.
- Assign project number
- Visit site if appropriate or check your company files for previous work at that location
- Complete the project site visit checklist
- Review project with a field person for their perspective
- Complete the project review form
- Identify critical path items and long-lead times
- Prepare the estimate in the same process that it will be built. This should also be in compliance with job cost reporting
- Evaluate if this is the type of work you want to do. Pass on it if it is not so
- Complete the proposal carefully.
- Prepare site map, location details and special site conditions
- Identify key operational constraints
- Price the job to maximize return to the company without alienating the client
- Keep a bid tracking summary and follow up.
- Review jobs lost and determine why
- Review jobs awarded and determine if you could have had a higher price.