



## PipeDrive CRM Flow

1. Speak with homeowner and get contingency signed. Make homeowner aware that one of our guys will be coming within 72 hours to take damage pics. Tell Homeowner that they will receive a Smart Text alerting them about one of our guys coming out to take damage pics. Homeowner does not need to be home for ITEL to take place!
2. Once signed, Add **ALL** contingency info into Pipedrive as a New Deal
  - a. Upload pic of signed contingency into the deal and label it as such
  - b. Create a Note Alerting Jacob G. that Eagleview and Generic Estimate are needed and TAG him by using @ sign and clicking his name
  - c. I will also assign ITEL pics to be taken by one of our ITEL team members and will note that in details under ITEL/AA
3. Follow up with Homeowner about AA and Once you receive AA date and time, make a note of it in your customers deal in Pipedrive and tag Jody using @ sign
  - a. At this time I will add AA to google calendar and tag you the owner, please accept notification which goes to your 5 star email address.
  - b. You must attend your own AA representing 5Star, if you can not attend, it will be covered by someone else, who will receive \$100 deducted from your pay**
4. After AA, get estimate from either the adjuster or customer and email to Jody—[admin@5starrandr.com](mailto:admin@5starrandr.com) who will then upload it into your deal on PD
  - a. If you have not already done so, please get Shingle Color from customer at this time and note it in details in Pipedrive.
  - b. If customer is not wanting to choose a color prior to contract being sent, then they must fill out a separate Shingle Color Request form which Jody will email to them for signature.
  - c. No materials will be ordered without a SIGNED proof of Shingle Color choice!

5. If fully approved, Jody will then draw up contract numbers, which will be approved by Jason, and then Jody will draw up an Agreement that will be emailed to the customer for an E-Signature through Adobe Sign.
  - a. Jody will upload the Unsigned Agreement into Pipedrive, so if your customer does not want to E-Sign, **YOU** are responsible for printing out the Contract, taking it to the customer, getting it signed, and then uploading **ALL** pages into the Pipedrive deal.
  - b. NO MODIFICATIONS CAN BE MADE TO ANY AGREEMENT BY ANYONE EXCEPT JODY WITH APPROVAL BY JASON!! If a modification is needed, please contact Jody with it and if approved the contract will be revised and re-sent to customer for signature.
  - c. F/U with your customer to make sure they have received their agreement and ask that they sign and return within 48 hours
6. We now wait for the Homeowner to receive their first check from the insurance company, which we will collect from them. If you are unable to collect the check, someone will be asked to collect it for you.
  - a. Follow up with Homeowner OFTEN about if they have received their check! Do not expect them to call you, it is your responsibility to GET THAT MONEY!
  - b. Once collected, make note in PD that it was collected and the date and amount
  - c. Drop check off at the 5star office to be deposited or overnighted if Mortgage Check, Please do NOT delay this process
7. Material drop is set up once the first check is deposited into 5 Star account by Jacob G., once Approved by Jason
8. Install occurs within 72 hours after Material drop
  - a. Please advise customer of this and have them make sure everything is removed from driveway etc as stated in their signed Agreement
  - b. Please take before and after pics of all Installs and email them to Jessi at [customerservice@5starrandr.com](mailto:customerservice@5starrandr.com) for posting on our website
9. The Final Invoice is then written and sent to insurance company by Jacob and/or Jason. It is also uploaded into each Pipedrive Deal.
10. Follow up with Homeowner often about if they received their Final check from Insurance company. **Same rules apply that applied to First Check!! Please refer to #6!**
  - a. At this time of collecting the final check, thank the customer for choosing 5Star and ask them to leave us a 5 Star review on Google review for which they will then receive a \$50 Lowes Gift Card, delivered by YOU

11. When Job is complete and ALL payments are received and deposited, your customer will be sent a registered GAF warranty by Jody to their email. Please let them know they should receive this within 2 weeks after Final payment is collected.

- a. At this point, Jody will move your deal under Warranty in PD. At this point the deal is completely finished.

\*\*Deals are only moved around in Pipedrive by admin which are Jason, Jody, and Jacob. Please do not perform any movement of deals on your own.\*\*