RAI Process Outline – Created 5/9/23 – Revised 5/22/23

1. Once an inspection has been completed, the inspection report will be sent to the customer, cc’ing territory manager, RAI cycle owner, and sales rep and an RAI quote will be opened if any deficiencies were listed on the report. The expectation is that the report will be sent, and the quote will be opened up by the planner who coordinated the inspection in 2-3 days after the inspection has been completed.
2. Once the quote is opened in ACS, the expectation is that the RAI cycle owner will assign the quote to himself, inside sales rep, or operations team member in the CRM within a day of the quote populating on the CRM HR RI Process report. 50% of all open RAI’s should be allocated to other team members to aid in hitting the 5-day turnaround target
   1. Whether or not a team member is asked to help in estimating an RAI quote will depend on the overall workload that is assigned at the time. The overall goal we will be aiming to meet is that all RAI quotes will be completed within 5 days of the quote being opened. This will mean all RAI quotes should be sent out within 2 weeks (10 business days) after completion of the inspection.
   2. The RAI cycle owner is responsible for communicating the urgency/priority of any quotes that his teammates are assisting with.
3. While a quote is in progress of being completed, stages should be updated and notes should be added in the CRM accordingly on the HR RI Process report by the individual who has been assigned the quote.
   1. Delays that prevent an estimate from being completed within the 5 business day target should be relayed to the RAI cycle owner asap by the individual who is working on or assisting with the quote. The expectation is that technicians will communicate hours/men needed equipment needed and materials needed in the comment sections of their reports in InspectAll.
4. In the event that parts pricing takes longer than 4 Business days, a secondary quote will be opened by the person who is building the quote that is experiencing delays so that nothing is missed.
   1. The format of the quote name will be “Customer Name + RAI + Inspection #” for the initial repair quote. If a secondary repair quote is opened up due to delays, the quote name will be “Customer Name + RAI + Inspection # + Remaining Parts + ACS + Quote #”. *For example “PCA RAI 149557 ACS 23029”*
5. Once the quote has been marked completed in the CRM on the HR RI Process page by the individual tasked with building the quote, the RAI cycle owner will review the quote and send to the sales rep, territory manager, and zone coordinators. The sales rep will be responsible for all follow-ups, delivery of the quote to the customer and CRM updates.

The sales director shall be cc’ed as well for all quotes > $10,000.00 (continued…)

(5 continued…) If the sales rep is out of the office when the quote is ready to be sent, the quote will be sent by the RAI cycle owner to the Director of Sales to facilitate the distribution of the quote to the customer in absence of the outside sales representative.