

## Project Manager Procedures & Expectations

**Daily Duties** - Every morning you will be expected to report to the office at the start of your shift. While waiting for leads to come in you will be going through open jobs and generating photo reports in Company Cam for jobs in which the dryout is complete and uploading them to Basecamp, following up on pending jobs to convert them to sales, managing the scheduling of the different phases of the dryout process for current jobs including moving them through the different phases in basecamp, fielding calls from adjusters regarding jobs, and providing information regarding scope of work to recon, abatement and packout teams when needed. It is your responsibility to manage a job from the initial assessment all the way through the start of the reconstruction.

**Assessments/Leads** - Take moisture and humidity readings using a moisture meter and thermohygrometer and use thermal imaging to locate and document the extent of the damages. Use a sharpie and/or blue tape to mark the affected areas and map the moisture. While taking temp/humidity, moisture readings and thermal imaging, take photos of readings and thermal images in Company Cam.

### **Sell the job:**

- a) If it will be a covered claim, advise the homeowner that the next step in the process is to gather some information and get the claim filed. Fill out the Sales Sheet with the homeowner and gather the information needed to file the claim. Once the required information has been gathered, call the insurance company on speaker phone and file the claim with the homeowner, do all the talking to the insurance representative. If the representative advises not to do any demo until an adjuster comes out, politely disagree and advise them that "we will be starting mitigation procedures immediately in accordance with IICRC S500 Section 12.2.1"
- b) If it will not be a covered claim, offer a cash price. The cash price should never be lower than \$3,500 unless approved by management.

**Get "a couple signatures"** - Using the information obtained, fill out the Work Authorization & Direct Payment Agreement in SignNow (or Emergency Mitigation Services Contract if a cash job). Once the documents are filled out completely, have the homeowner sign them. Once signed, save the document with the homeowners last name appending the name of the document.

**Set equipment** - minimum of 1 dehumidifier in each area where work will be taking place, set 1 Air Scrubber in the unaffected living area. Take photos of the equipment plugged in and running.

**Documentation** - Document your time setting equipment, the amount of equipment, and moisture/temp/RH readings on the Sales Sheet. Double check the Sales Sheet to ensure you have all of the information relating to the job. MAKE SURE TO GET THE INFO FOR TEMP SET, HVAC DETACH IF IT APPLIES, and get the invoice from the plumber (aka Plumbers Report).

**Take wide angle photos and a walk through video** documenting all of the affected areas, equipment, and contents in the affected areas needing packout. Upload all photos and video to **Company Cam**

**Sales Thread** - Using the template provided by dispatch and the Sales Sheet, fill out the sales text and send it into dispatch along with your walkthrough video immediately. You can sit in your car in front of the homeowners house or the gas station around the corner, but the text needs to be sent ASAP.

**Create Basecamp Project** - Using the template in Basecamp, create a new project and name it using the standard naming conventions used on projects. Add the customer address, phone number, email and any POC information in the details section. Copy and paste the lead text you sent into dispatch into the "Lead Text" discussion.

**Scheduling** - Stay in contact with the homeowner and monitor the testing and packout threads and schedule Prep, Demo, Monitoring, and Final Service calls with the homeowner and add to Google Calendar

**Ready for recon** - as soon as demo is complete, copy and paste the original lead text into the recon ready thread adding what areas and materials were demoed, check to see if packout is needed for recon, if packout is needed for recon then send the same text that you sent into recon ready thread into packout thread, when recon team is assigned, update packout thread with RMO team info.