



Standard Operating Procedure (SOP)

(Color Consultation & Color Selections)

[!2/13/23]

[Russ]

Objective:

[instructions of the process involved to properly confirm and document customer color selections.]

Scope:

[Client advocate to follow this as part of the pre job process]

Responsible personnel:

Client advocate]

References:

[Color consultant: Julie Child, jccadaz@gmail.com 480-241-2540]

Procedure:

Clients' colors may be received for projects in various ways such as directly from the client over the phone, via email, or by email from Julie, our color consultant. Regardless of how the colors selections are received it is imperative that they are accurately documented in our system and confirmed by the client.

When a project is sold which includes a complimentary color consultation this will be noted on the scheduling form and as part of the scheduling process. The client advocate will send an email to the client, and the color consultant. This email serves as a handoff of sorts for the color selection process over to our Color Consultant. *You may follow up in 2 days to verify whether the Color Consultant has made contact yet. Although they are an independent contractor, this process is still our (ACP's) responsibility to ensure follow through on.*

Steps to ensure a smooth recording of colors from start to final brush stroke are as follows:

- In your Pre-Job Call (*see pre-job call checklist*) with the client you will be verifying their colors, sheens, and locations of paints.
(*Over Confirm with the client! They may get frustrated, but we must be certain of their colors. When in doubt, apologize for the inconvenience and ask again.*)
- Cross reference the clients selections with what is proposed on the Estimate Rocket Document. We charge additional for color transition lines. Sometimes the color consultant or the client will select multiple colors for one space that we had not accounted for. If this seems questionable, ask the salesperson if it was accounted for or if there needs to be an additional charge. Not doing this properly can create an uncomfortable discussion about an additional charge with the client after the work is completed. This can be avoided by addressing it proactively prior to the project's start.
- It is very common for Julie to suggest additional colors and also sometimes suggest they paint additional areas not originally requested. Always cross reference her list against what has been proposed and bring discrepancies to the attention of the sales person so changes to the scope of work can be made.
- Once you have verified the customers color details you will input them on their project in Estimate Rocket. (In the line item for *Color Details*).
- *It is important to delete any unnecessary information from this document. For example: the exterior paint color details line item includes all typical surfaces as a template to save time. if we are not painting the pop-outs, delete the line that says pop-outs. If we aren't painting the front door, delete "front door" from the color item.
- ***Ensure all documents reflect the most current record of paint details - delete and reupload work order to Slack channel if required***