

DETAILED JOB DESCRIPTION FOR THE CLEARY COMPANY**PURPOSE**

The Estimator is responsible for the entire estimation operations process of The Cleary Company. They will also be a liaison between sales & production teams and responsible for creating a budget for all jobs.

RESPONSIBILITIES/DUTIES

1. Maintain 40 hour work schedule.
 - a. May need to be available by phone & check voicemail/email messages during times when needed.
 - b. May need to work longer hours as needed during heavy times to keep all duties performed satisfactorily- long hours are to be the exception not the norm.
2. Assist in gathering of new job information.
 - a. Work with Sales/Design team for determination clients needs/wants and possibilities and limitations.
 - b. Review initial job photos & notes. Identify obstacles early on at site visit.
 - c. Visit jobsites as needed for additional information needed in estimation.
3. Set up initial estimates ranges based on preliminary designs for initial presentations based on past similar jobs to
 - a. Update Cleary Company pricing tables as needed with notes and pricing to aid in future estimations.
 - b. Evaluate past projects and budgets to create database of usable cost data to help create more accurate future budgets
4. Solicit multiple quotes from Trade Partner & Vendors.
 - a. Evaluate project and onsite conditions to determine what TP's need to make site visits and who can bid off plans
 - b. Solicit and meet TPs on site to review project scope and identify obstacles prior to bid, report findings to PD and Designer as necessary
 - c. Verify pricing on bids to be sure we are getting the best product for the money.
 - d. Verify scope of work on bids is all inclusive of work expected, note any and all exclusions on bids and make sure those items are either budgeted for or excluded in our contract verbiage.
 - e. Implement Trade partner agreements with details, timelines and payment schedules and disclaimers.

THE CLEARY COMPANY

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5. Produce estimates for Design A's/Contracts & present to Sales team for approval.
 - a. Verify budget is attainable to meet our gross profit goals.
6. Keep current with new products, Trade Partners & Vendors.
 - a. Visit showrooms & industry open houses/events as needed.
7. Write scope of work and contracts for Sales team to review.
 - a. Detailed scopes to include all specifications for proposal
 - b. All work to be completed by The Cleary Company & also to include work NOT being done by The Cleary Company.
8. Initiate & lead in-office preconstruction meeting w/ Sale person and/or Designer.
 - a. Explain in detail the job to the Production Manager- this will include but not limited to the scope of work, give insights to the customers desires and concerns along with detailed field notes and job costing codes.
9. Assist Production Manager with schedules as needed to keep transition smooth between Sales team & Field team.
 - a. Support the Sales team & Production Manager so they can succeed.
10. Produce a project budget for the Office Manager to enter into QuickBooks.
 - a. Get copies of commitments for Office Manager & keep office-client binders updated.
 - b. Assist Office Manager with all job documentation (purchase orders, commitments & invoices).
11. Have input over hiring and firing of trade partners.
12. Have input over hiring and firing of Cleary Company employees.
13. Prepare & write change orders.
 - a. Knowledge of our price structure- labor cost per hour, etc.
 - b. Create change order budgets for the Office Manager.
14. Attend weekly sales meetings
 - a. Main role for meetings is to keep ahead of sales/design team so they are prepared to sell upcoming D. Agreements and Construction Contracts.
 - b. Keep in communication with Production Manager for upcoming jobs.
15. Attend association and industry meeting on a regular basis.
 - a. Keep current on all continuing education requirements.
 - b. Maintain/Cultivate relationships with Trade Partners, Vendors & other Industry Professionals.
16. Assist Office Manager & Production Managers in final billing upon job completion as needed.
17. Will manage the use and security of all Cleary Company property, data and lists.

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I _____ agree to the above and have a copy for my future reference.
PRINT NAME

Employee Signature _____ Date _____

Employer Signature _____ Date _____

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