

JOB DESCRIPTION

PURPOSE

The Project Developer is responsible to plan and carry out all pre-production sales and estimating activities on assigned customer accounts as well as assist with unassigned sales activities as needed by the team. Project Developer is responsible to ensure customer satisfaction and maintain open communication through the project's completion. The Project Developer will be responsible to communicate all job specific needs to the production teams prior to project start. They will be responsible for creating a budget for all assigned jobs.

RESPONSIBILITIES/DUTIES

Leads/Clients

1. Generate and qualify leads
 - a. Respond to all sales inquiries and concerns by phone, email or in person
 1. Follow up with initial email to provide contact info and solidify initial meeting date
 - b. Update Sales Tracking with all applicable information in a timely manner
 1. Track all projects from lead through contracting signing
 - c. Enter lead information into outlook contacts & share with team
2. Conduct initial meeting with Clients in their home
 - a. Collect information about goals and scope of work from Client
 - b. Review existing conditions for opportunities and obstacles to scope of work being considered
 - c. Create excitement with Client for working with The Cleary Company
 - d. Take photos & measurements as necessary to accurately describe potential projects to team
3. Participate in EOS meetings to make sure all Project Developers are giving out similar pricing at the beginning of client communication
 - a. Create initial job notes for EOS meeting, and take notes of info discussed during meeting.
 - b. Deliver detailed EOS with budget & design fee expectations within 10 days of initial meeting
4. Participation in production meetings, providing updates on upcoming projects to aid in scheduling for production
 - a. Give support when needed to the field so they can succeed
5. Engage Client in design process through Deposit/Design Agreement
 - a. Present schedule of meetings, site visits and presentations in coordination with Designer
 - b. Assist in field measuring, photography of existing conditions with Designer
 - c. Communicate progress and expectations to Clients throughout Design process
6. Work with Design team to make sure clients' needs are being met through presented design
 - a. Communicate any prior conversation to designer prior to client meeting
7. Assist in gathering of new job information
 - a. Work with Sales/Design team to determine client's needs/wants and possibilities/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
 - d. Look for existing conditions that will come back to cost us or client more \$ or headaches at initial site visits and bring on others to solve issues during design stage. IE: floors out of level

1. Request Project Manager attend job site visit as needed

Trade Partners/Vendors

1. Solicit quotes from Trade Partner/Vendor & evaluate pricing
 - a. Maintain relationships with Trade partners, spread work around
 - b. Verify pricing on bids to be sure we are getting the best products, best pricing and best solution for both the team and the client
 - c. If working with a new product or trade partner or feel that pricing is not accurate solicit a secondary bid from another trade partner
 - d. Identify if pricing fits into the client's desired budget, value engineer plans as necessary
2. Evaluate Trade Partner Pricing
 - a. Understand completely what trade partner is bidding, through follow up if necessary. Get bid in writing with quoted specifics
 - b. Break pricing down per sq.ft./ln.ft./ea. and compare to past pricing in pricing table
 - i. Create and update pricing tables with valuable information for future project
 - ii. Table to include overall project pricing as well as trade partner pricing
 - iii. Keep and reference pricing breakdowns from Trade Partners for future work
 - c. If pricing seems "out of wack" find out why, get another quote, and/or negotiate price
3. Write scope of work and contracts for the team to review
 - a. Scope of work to be all inclusive of budgeted items & accurately represent the design proposed to the client. To be as clear as possible to avoid costly mistakes or interruptions
 - b. Include work to be completed by The Cleary Company and/or Trade Partners/Vendors
4. Find and assess new Trade Partners
 - a. Make clear requirements of The Cleary Company
 - b. Evaluate if the trade partner will be a good fit for what The Cleary Company is trying to achieve from partnership
5. Keep current with new products, Trade Partners & Vendors
 - a. Visit showrooms & industry open houses/events as needed

Design Agreements/Contract

1. Produce/Review/Present estimates for Design Agreements/Contracts to clients
 - a. Verify budget is attainable to meet our gross profit goals
 - i. Must be reviewed & approved by Owner or other PD
 - b. Confirm scope of work is covered in budget
 - c. Work with designer to "Value Engineer" the design if necessary
 - d. Present successfully to the client
 - e. Produce budget for the office manager to enter into QuickBooks
2. Lead InHouse PreCon meetings for all contracts as assigned or as needed
 - a. Draft field notes including notes from contract meeting
 - b. Produce any Change Orders determined at contract meeting or throughout the project
 - c. Communicate details pertaining to the job, includes, but not limited to, the scope of work, insights to the customer's desires/concerns and detailed field notes with job costing codes
3. Participate in Onsite PreCon meetings for all contracts with Project Manager & Clients

- a. Be available to discuss & explain in detail the scope of work, review initial construction schedule, discuss client's daily schedules, desires & concerns
- b. Project Developer and Project Manager will lead this meeting
4. Communicate with Project Manager & Designer throughout the project
 - a. Be available to resolve any issues, track changes and/or answer questions
 - b. Create and present Change Orders in timely manner to keep Client up to date on costs and schedule impact – Project Manager & Designer to provide specs & costs as necessary

Administrative

1. Manage the use & security of all Cleary Company property, data & lists (both physical & electronic)
2. Work a minimum 40 hour week:
 - a. Be available by phone M-F 7:00 am to 7:00 pm Sat 7:00 am – 12:00 pm
 - b. Check email & phones messages during other times
 - c. Work hours as needed during heavy times to keep all duties performed satisfactorily
 - d. Long hours are to be the exception not the norm
3. Attend regular association and trade meetings for networking purposes
 - a. NARI or BIA Remodeler's Council meetings or events
 - b. Other community associations or charity events
 - c. Travel as needed for meetings & education
4. Help maintain the pipeline and job management through the use of Builder Trend
5. Participate in the hiring/firing of trade partners
6. Recognize 1 Year & 2 Year warranty follow-ups as a marketing tool
 - a. Engage with clients in meaningful way so they feel The Cleary Company is the "Remodeler of Choice" for them
 - b. Participate in meetings with production who complete all warranty procedures and work in timely manner in order to inquire on additional client needs
7. Monitor competitors, market conditions and product development
 - a. Keep abreast of new innovations, developments and market changes to ensure designs and ideas are up-to-date and creative in "today's" market
 - b. Visit showrooms & industry open houses/events as needed
8. Answer phones as needed
9. Maintain industry required and encouraged certifications
10. Praise Cleary team and suggest improvements when needed
 - a. Keep the team's morale high
 - b. Initiate team bonding by scheduling lunches, road trip or site visits with office, sales & field team
 - c. Use Cleary Company CAP reminder- Clarity, Accountability, Proactive
 - d. Maintain a strong work ethic for yourself and your managed team
 - e. Give support when needed to the field so they can succeed

Other Duties as assigned

I, _____ agree to the detailed job description for a
PRINT FULL NAME

Project Developer – Department Manager and have received a copy for my records.

Employee signature

Date

Manager signature

Date