

Blinds — Post-Enquiry Workflow

Approved: Shane Hammond, Managing Director · Process owner: Sales Manager · Effective 11/06/2026

Purpose Standardise how a blinds enquiry is handled from first call to review request, so every job is consistent, profitable, and fully documented.

Scope Blinds-only enquiries supplied and installed via All Weather Blinds (AWB). Excludes patios, carports, and decks.

STAGE	OWNER	KEY ACTIONS
1. Lead & qualify	Customer Service	Call, qualify: window count, motorisation/electrical, budget. Price-guide against the \$800–\$3,000 range. Standard → CS closes. Complex / high-value → book DC consult (phone, video, or site).
2. Quote & close	CS or DC	Present quote or run consult; sell and sign contract. Take deposit; pass paperwork to Accounts.
3. Order & schedule	Accounts + AWB	Accounts raises PO to AWB. AWB check measures, orders blinds, books electrician (if needed) + install date, and sends the dates to us. AWB confirms the order is correct and invoices the check measure → pay DC commission (sale now locked past measure).
4. Supply & install	AWB	AWB installs blinds (plus electrical if required). Customer signs the completion certificate. AWB sends us the signed certificate + install invoice (incl. electrical).
5. Complete & follow-up	Accounts + CS	Invoice the customer for the balance; collect payment, then release AWB's install payment. CS sends the thank-you pack (warranty etc.) + Google Reviews link.

Cash-flow controls

- Size the deposit to cover the Company's upfront outlay (check measure + DC commission), so we are never out of pocket before the customer's balance is received.
- Always collect the customer's completion balance before releasing AWB's install payment.

Definitions

CS — Customer Service · DC — Design Consultant · AWB — All Weather Blinds · PO — Purchase Order · CM — Check Measure

Process flow

Customer service Design consultant AWB Accounts

