

# TOM'S TOOLBOX *POWERED BY VONIGO*

## CHEAT SHEET : Terminologies, Abbreviations & Definitions

**Agreement:** When a proposal is accepted by the Client Partner. Definition: A legal document, the word "Agreement" is used to mean a promise/commitment.

**Appointment:** When a Client Partner is scheduled for an estimate and/or production on the Calendar. A promise to meet someone at a particular time and place.

**Availability:** Allows User to better manage resources (Employees, Sales, Etc.) Used in Business Unit to Pre-Set Calendar Set-Up of Territory, Zones, and open time frames.

**Book Off / Close Off:** Blocking time from or on the Calendar.

**Booker:** Any Client Partner that schedules an Appointment or Event. (As opposed to a Lead)

**Business Unit:** A Franchisee's profile and settings.

**Client Partner:** Our Brand name for a client. It is our goal to partner with our client for successful projects.

**CM:** Craftsman. A person who is skilled in a particular craft. Employed by Honey Do Service Inc. to perform production.

**Cost:** =Wholesale= Dollar value Honey Do Service Inc. pays pre-taxed for any materials or labor associated with a project.

**CRM:** Customer relationship management (CRM) is a technology for assisting and help managing/automating your company's operations.

The goal is to improve your business relationships and to grow your business. A CRM system helps you stay connected to clients, streamline the process and ultimately improve profits. The new Tom's Tool Box has a fully integrated CRM component designed to help you primarily with automated communications messages for your client before, during and after the job is complete. This system is driven by capturing client's email and texting information. Here is a brief overview of the Tom's Tool Box CRM system.

**Sales force automation** - By automating the messaging to our client partners, it allows a more efficient communication process and helps free up resources for other tasks. The system currently has 14 different client partner scripts which are integrated into various areas of the CRM. For the Sales / Estimators their messaging generates from the schedule estimate through

the Proposal process and finally to the sold job portion. Moreover, it allows a better way for Sales to follow up on proposals and status changes through a manual or automated function.

**Human Resource management** - One of the office manager's role is in human resources. TTB allows them to easily manipulate information for inputting employee data, use of calendar availability and setting up their respective permission group. These features enable the system to maximize efficiencies of labor.

**Lead management** - TTB allows better control over ever changing database of new and repeat clients through a color coded calendar / scheduling module, enhanced search function and client partner status screen.

**Client service** - CRM platforms are designed to maximize client satisfaction using automation to better communicate from a client's first phone call to when the job is completed. One area in which the CRM has enhanced our existing system to provide our client partners with additional production communications. The system now can automatically provide more up to date information in the Pre-production, Production and finishing phases of our operation.

**Marketing:** All in all, we have currently 14 different messages and triggers to our clients. This allows for better marketability and provides, you the owner, more exposure and many more opportunities. Moreover, the system generates post production messaging with links to Google reviews and Client surveys. As an enhancement feature, TTB sends out messages to our "lost" sale clients allowing greater capture. Finally, in the future, we can provide a better supplemental marketing program to our owners.

**Work-Flow Automation:** Automation means saving time and money to our owners. It provides efficiencies and allows our staff to work smarter, fills in gaps in sales and marketing and provides a smoother operation.

**Business Reporting and Analytics:** Tom's Tool Box now a vast reporting system which can be customized to give tailored made reports to each owner. From closing ratios to revenue reports, Tom's Tool Box now has the power to help you better manage and understand your business in this ever changing environment.

**Deactivate:** Places someone in a non-active position (Always recommend over Delete)  
Deactivate allows Honey Do Service Inc. to recall any data associated.

**Estimate:** A Scheduled Event to roughly calculate the value of what a project might cost in dollars. Used to validate a Client Partner.

**Event:** Same as Appointment

**Field Service Management (FSM):** Refers to the management of a company's resources employed at or en route to the property of Client Partners, rather than on company property.

Examples include locating vehicles, managing worker activity, scheduling and dispatching work, ensure driver safety, and integrating the management of such activities with inventory, billing, accounting, and other back office systems. FSM most commonly refers to companies who need to manage installation, service, or repairs of systems or equipment. It can also refer to software and cloud-based platforms that aid in Field Service Management. FSM is cloud based and a mobile application making it usable from any device.

**Filter:** Ability to change search parameters.

**GM:** General Manager. Has full access of all permissions for managing both the revenue and cost elements of a Honey Do Service Inc. income statement, known as Profit & Loss (P&L). Build a culture and manage a branch or location of a Honey Do Service Inc.

**Invoices:** Document showing pricing and payments for a Client Partner's project, with a statement of the sum due.

**Leads:** Client Partner not scheduled for any Event and may be a potential customer.

**Library/Help Center:** Forms used by Honey Do Service Inc. A collection of data organized systematically and kept for research or training.

**OM:** Office Manager. Is in charge of answering phones, scheduling Events, and helps with managing invoices. Has the same permissions as the Owner.

**Price:** =Retail= Total dollar charge the Client Partner will pay for a project.

**Pricing:** Used in Business Unit to Pre-Set Labor Rate and Material Mark-Up.

**Proposal:** Presentation of scope of work to include pricing for work to be performed.

**Quotation:** Same as Proposal.

**Reports:** Data/Calculations of specific criteria for analysis, including Material List, Etc.

**Service Call:** Scheduling a Client Partner for Production, skipping the Estimate phase. Based on time and materials charges. A trip made by a Craftsman to visit the location and make repairs or production on an hourly basis.

**Status:** Shows something in a particular set or position such as ie. (Active, Inactive, Open, Completed, Etc.)

**Sub-Contractors:** An independent licensed and insured business or person that carries out specific production for Honey Do Service Inc.

**Summary/Description:** Defining details of work or materials. Clear wording that details and defines tasks and materials.

**Task:** Clearly defines a description for production to be performed.

**TBA:** To Be Assigned, this is used for production assignments on Calendar that have to be assigned to a Craftsman.

**Teams:** Used to combine employees into specialized groups in Production.

**Work Order:** Document authorizing work to be done.

**Zones:** Used in Business Unit to define territory by grouping to create group efficiencies for Sales/Estimators drive time.