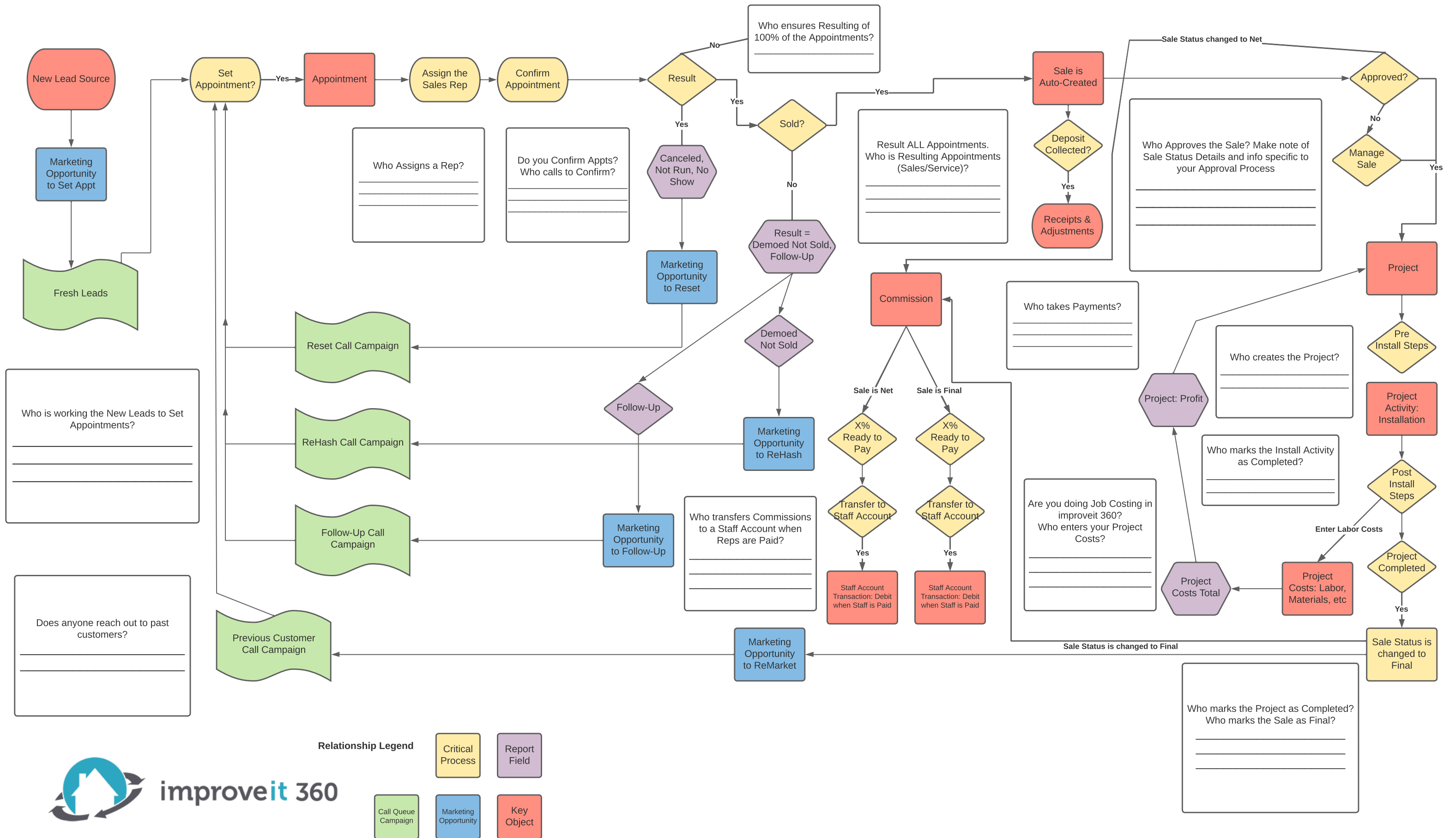


# improveit 360 Process Accountability Diagram - who is responsible for critical system processes?



Who is working the New Leads to Set Appointments?  
 \_\_\_\_\_  
 \_\_\_\_\_

Does anyone reach out to past customers?  
 \_\_\_\_\_  
 \_\_\_\_\_

Who Assigns a Rep?  
 \_\_\_\_\_  
 \_\_\_\_\_

Do you Confirm Appts?  
 Who calls to Confirm?  
 \_\_\_\_\_  
 \_\_\_\_\_

Result ALL Appointments.  
 Who is Resulting Appointments (Sales/Service)?  
 \_\_\_\_\_  
 \_\_\_\_\_

Who Approves the Sale? Make note of Sale Status Details and info specific to your Approval Process  
 \_\_\_\_\_  
 \_\_\_\_\_

Who creates the Project?  
 \_\_\_\_\_  
 \_\_\_\_\_

Who marks the Install Activity as Completed?  
 \_\_\_\_\_  
 \_\_\_\_\_

Are you doing Job Costing in improveit 360?  
 Who enters your Project Costs?  
 \_\_\_\_\_  
 \_\_\_\_\_

Who marks the Project as Completed?  
 Who marks the Sale as Final?  
 \_\_\_\_\_  
 \_\_\_\_\_

Who transfers Commissions to a Staff Account when Reps are Paid?  
 \_\_\_\_\_  
 \_\_\_\_\_

X% Ready to Pay

Transfer to Staff Account

Staff Account Transaction: Debit when Staff is Paid

X% Ready to Pay

Transfer to Staff Account

Staff Account Transaction: Debit when Staff is Paid