

COMMERCIAL RESTORATION ADMINISTRATION TASKS

On commercial losses, there is a definite need for administrative support. Your office will play a key role in the proper production,



management, documentation and communication on a project. Their commitment to the project and their expertise can make the difference between a successful project and one filled with issues.

CREST Members receive all training and information to give their companies an advantage when going after and landing desired commercial losses. Part of that training involves responsibilities that other personnel (those other than the production teams) will bear during the project. For purposes of this manual, we will focus our information on all the other members of your staff.

A word of caution: please do not strain your company's normal operations by lumping a lot of the administrative tasks on a single person who is already a strong support player in your everyday business. In your desire to limit expense or handle everything in house, you can run the risk of overwhelming your staff members and take their focus away from their other tasks.



If this happens, then not only will your commercial loss suffer, but so will your regular business. We do not take on commercial work to harm our everyday business; instead, it is supposed to complement and augment your income. If you cannot handle the tasks with in-house staff, then it would be advisable to hire additional staff for the project or reach out to CREST for project support. Remember, this is part of your Membership (the ability to get project support), and you should take advantage of this valuable asset.



ROLES FOR EACH STAFF MEMBER

MARKETING REP



When a commercial loss comes in, your marketing rep can serve a couple of functions. If the loss is from one of their lead sources, then he/she will be a valuable on-the-site resource for your company.

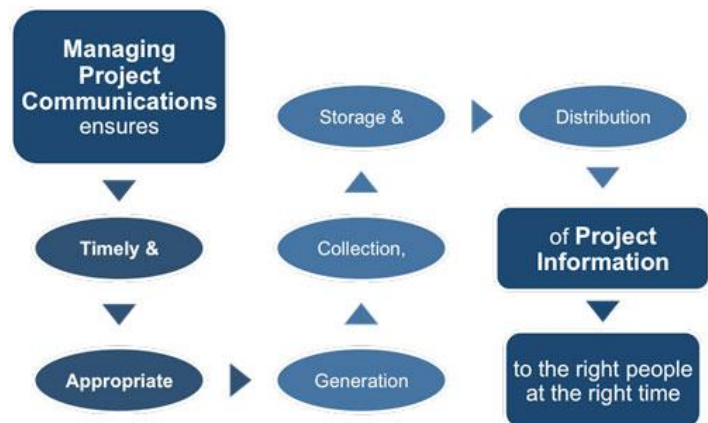


Their relationship with their contact can create a sense of comfort at a time of chaos.

They should be on site for the project manager, and when it is necessary, he/she can become the best communicator of information to the client. Use their talents and relationships to keep the lines of communication open and transparent. This is vital to your overall success, and this person can give you a strong presence on the project.

If the loss is not generated from one of their leads, then your marketer can be on-site to meet with the managers or other interested parties in hopes of working into an ongoing relationship. Remember, commercial structures tend to have more repeat calls than a normal residence (think hotels and assisted living centers), so it makes sense to have a relationship with the principals going forward. Once again, they can help with communication and logistics.

Please avoid the desire to use this person in a different capacity on the project. They will still need to spend the majority of their week doing their normal marketing operations and taking them away to do other tasks will compromise the momentum you are building through their regular marketing routine. Their interactions on the project should be regular but not full time. Work them into the project but work within their schedule.



OFFICE MANAGER

If your company employs an office manager, this person is the lifeblood of your day-to-day operations. They are responsible for almost everything that you need to have watched over in the office, from bills and payments to timesheets and purchases. They are knowledgeable about everything in the company and have their hands in everything, from projects to staff to problems and issues to be dealt with.



Again, this highly competent person will lead you to want to put them in the middle of the commercial loss. Their skills can keep the project on track and navigate through some issues that can be avoided if they are involved on-site. Avoid this situation! **Your company NEEDS the manager to remain as a manager.**

However, they can provide a ton of support from the office. Use their skills on the project, letting them do the things that they do best every day for the project. If they do all the purchasing, then they can coordinate the supplies to be delivered to the job. If they are great with staff communications, then allow them to set work schedules and coordinate with the project manager for adequate additional support staff if needed.

BOOKKEEPER

Your bookkeeper can be a huge support for you and your team without ever leaving the office. Their ability to keep track of the financial aspects of the loss can give you a great feel of the cash needs, the productivity of the project, and any potential expenses that you may be forgetting. Put them in contact with your project manager and documentation person,

and make sure that every invoice or expense is given over to the bookkeeper EVERY DAY. Their real-time responsibilities will include a full accounting of the project, helpful to you, the client and their carrier!

FILE MANAGER

Many companies employ a file manager to keep track of the paperwork generated on projects. If your company uses this person, then you have hit the jackpot for a commercial loss! Their training and abilities will give you a strong person to put in charge of the paperwork and documentation.

One of the most vital tasks that you can assign is that of the documentation specialist.





This person **MUST** make sure that everything your company is doing is being documented (proven) to ensure an accurate, justified invoice. Failure to do this task will jeopardize your chances of ever getting paid for your invoice.

This is the only case where we would recommend using this person from your office and moving them onto the project

site. Even though it will disrupt your everyday operations, the importance of this position on a commercial loss cannot be overstated. You must put your strongest person in this position, and task them with all the paperwork, photos, communications and other documents that are going to comprise your final invoice. They will work hand-in-hand with the project manager, who will set and drive the production.

A complete list of the documentation needed for your commercial loss can be found in the Production Manual.



For additional questions or challenges you may encounter, please call:

Bill Giannone 908-553-6295

Bill@theCRESTnetwork.com

or

Dick Wagner 419-202-6745

Dick@theCRESTnetwork.com

