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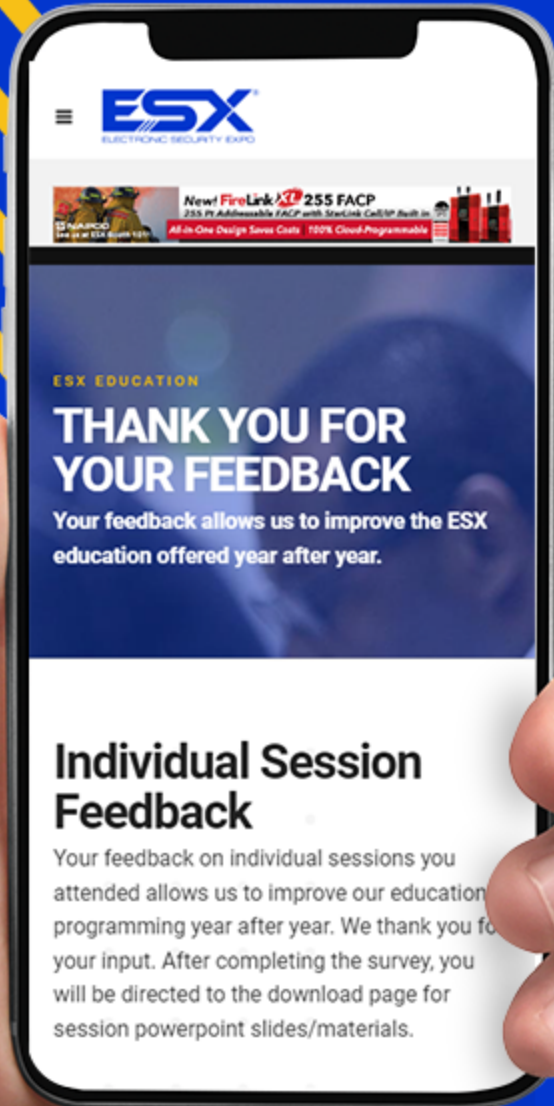


ELECTRONIC SECURITY EXPO

OPERATIONS TRACK

**HOW TO ENCOURAGE COLLABORATION BETWEEN
SALES AND INSTALLATION STAFF**

ESX **FEEBACK**



1

**ANSWER 5
QUESTIONS
ABOUT THIS
SESSION**

2

**GAIN
ACCESS
TO THE PPT
SLIDES**

3

**BE ENTERED
TO WIN A
\$100 GIFT
CARD**

3 GIFT CARDS (\$100 EACH) AVAILABLE FOR SURVEY RESPONDENT RAFFLES

WINNERS WILL BE NOTIFIED THROUGH THE ESX APP



**THE ELECTRONIC
SECURITY EXPO IS
OWNED BY:**

ESA ELECTRONIC
SECURITY
ASSOCIATION®

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The Connection Xchange

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COURSE OBJECTIVES:

How to Encourage Collaboration Between Sales and Installation Staff

- How to identify the obstacles that impede collaboration between the departments
- What sales and installation leaders must focus on to encourage collaboration
- How to create an environment of trust so the team feels comfortable in resolving conflicts and offering constructive criticism.
- Ideas and best practices that bring sales and install staff together and help achieve the organization's goals

MEET THE SPEAKERS



**CINDY
PONDER**

**VP OF OPERATIONS
BATES SECURITY**



**DANNY
GOODPASTER**

**VP OF SALES
BATES SECURITY**

WHAT WE GOT HERE

IS A FAILURE TO COMMUNICATE

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The greatest enemy of
communication is the illusion of it.

- *pierre martineau*
*Don't assume just because we need
each other that it means we will
communicate effectively.*

How to identify the obstacles that impede collaboration between the departments

- Communication in general
- Look at job performance/job review
- Backlog
- Price changes and backorders
- Sales training
- Techs in training
- Staffing issues
- Subcontractor challenges
- Customer expectations


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Job tasks and timelines - Process

Tasks						
#	Phase	Task	Job Status	Invoice		Approved
1	Install	Create Job in Sedona - AD	Creating Job In Sedona	Y	N	5/24/2023 8:11:00
4	Install	IM Review Job - IM	IM Reviewing Job	N	N	5/25/2023 6:58:00
5	Install	IC Confirmation Call - IC	IC Calling Customer	N	N	5/25/2023 7:59:00
6	Install	Schedule Install - IC	Scheduling Install	N	N	5/25/2023 7:59:00
7	Install	Order Parts - PI	Ordering Parts	N	N	5/25/2023 7:59:00
8	Install	Waiting to Install - IC	Waiting to Begin Install	N	N	5/25/2023 7:59:00
9	Install	Begin CSC Checklist - CSC	Starting CSC Checklist	N	N	5/25/2023 8:09:00
10	Install	Vrfy Syst Full Test - CSC	Verifying System Tested	N	N	5/25/2023 2:30:00
11	Install	Install Job - IC	Installing Job	N	N	5/26/2023 7:14:00
12	Install	Change Order - 1	Change Order	N	Y	5/28/2023 9:54:00
13	Install	Reconcile Parts	Reconciling Parts	N	N	5/30/2023 3:20:00
14	Install	Approve Installer PW - IC	Approve Installer PW	N	N	5/30/2023 3:20:00
15	Install	Job Done-Issue Insp - IM	Job Done - Issuing In...	Y	N	5/30/2023 4:34:00
16	Install	Sales PW Originals - AD	Awaiting Rquired Sale...	N	N	
17	Install	Review Job Cost	Reviewing Job Cost	N	N	
18	Install	Close Job - A	Closing Job	N	N	

Scheduling Checklist - Process

General questions:

Confirm hours of operation

Ask if there are any restrictions/requirements such as safety training, patient areas to avoid (hospitals), above ceiling permits required (hospitals)

Is there any ongoing construction that will prevent our scope of work from being completed?

Is this the best number to reach you with? Will you be available for a walkthrough, if not who should we expect?

How many of you will need training when we are done with the installation?

These are the days we will be on-site; do you have any shutdowns planned, or company holidays?

Environment of Trust



eNvI RonmenT of TRuST

The following is based on actual events

- Core Values
- RPRS – Right Person, Right Seat
- Difficult conversations, constructive discussion

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Ideas and best practices to bring sales and install together and help achieve organizational goals

- **Evolution of job submittal**
- **Pre-approval Journey**
- **Collaboration with each Branch Ops Manager**

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Site Conditions Worksheet



SITE INFORMATION		CONTACT INFORMATION	
Customer Name		Customer Contact	
Site Name		Phone	
Address		Email	
City		Premises Contact	
State		Phone	
Zip		Email	

System Type ☐ Intrusion ☐ Fire ☐ Access ☐ Video ☐ Other

JOB SITE INFORMATION & RISK FACTORS			
Required Start Date		Permits Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Required Finish Date		Under Construction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Building Sq. Ft.		Quick Turn Job?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Access Hours		High Security?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Ceiling Type	<input type="checkbox"/> Open <input type="checkbox"/> Drop <input type="checkbox"/> Hard Deck <input type="checkbox"/> Other <input type="text"/>	Plenum Cabling?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Ceiling Height		Customer Cabling Requirements?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Lift Required?	<input type="checkbox"/> No <input type="checkbox"/> Electric Scissor <input type="checkbox"/> Boom <input type="checkbox"/> Other <input type="text"/>	Site Safety Training?	<input type="checkbox"/> Yes <input type="checkbox"/> No Who, # <input type="text"/>
Lift Type	<input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor	Site Hazards/Liabilities?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Conduit Required	<input type="checkbox"/> Yes <input type="checkbox"/> No	Customer Training?	<input type="checkbox"/> Yes <input type="checkbox"/> No Who, # <input type="text"/>
Door Frame Type	<input type="checkbox"/> Hollow <input type="checkbox"/> Slashed <input type="checkbox"/> Other <input type="text"/>	Device Locations Accessible?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Wall Type	<input type="checkbox"/> Drywall <input type="checkbox"/> Concrete <input type="checkbox"/> Other <input type="text"/>	Power Available?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Network Type	<input type="checkbox"/> Customer <input type="checkbox"/> Private <input type="checkbox"/> Other <input type="text"/>	Phone Lines Available?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Scope of Work Template

Complete this template to generate your Scope of Work (SOW). The SOW is intended to document the mutual understanding between Sonitrol and the customer regarding the system to be installed. It also provides a detailed guide for technicians installing the product.

DESCRIPTION (1-2 sentences)

- Description of system to be installed.
- Customer expectations. Explain the 'theory of operation.'
- [e.g., "Honeywell Vista 20 intrusion system with 6 points to be installed to prevent burglary", "HIKvision video system with 10 cameras to be installed to prevent shoplifting", etc.]

SPECIAL CUSTOMER REQUIREMENTS

- Any additional requirements relevant to installation?
- Please include any requirements the customer has regarding camera views.
- Please include any customer provided "Playbooks" on installation requirements.

NETWORK

- Does the customer have a managed router or firewall?
- Are there enough physical open ports on the customer's network hardware for the number of devices we are installing?
- Have you discussed bandwidth with the customer?

SUBCONTRACTOR

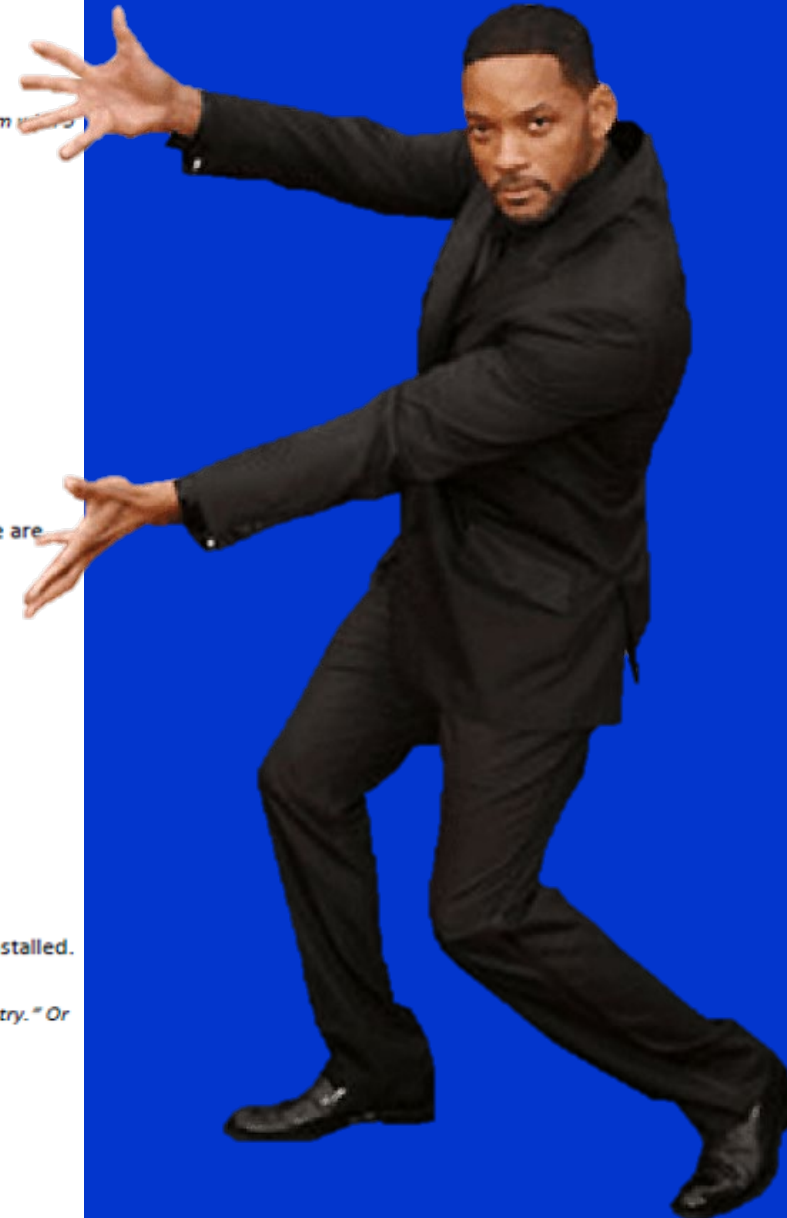
- Are subcontractors used for any part of the job scope?
 - If YES please indicate subcontractor information and attach quote.
 - If NO please indicate no subcontractor work required. .

DEPLOYMENT

- Itemized and numbered description of equipment with specific location of where equipment is to be installed.
- Please include any needs/requirements for commissioning/integration.
- [e.g., "Interior camera to be mounted on ceiling in northwest corner of foyer to monitor reception desk and front entry." Or "Access control installed on office side of warehouse entrance (door 3 on attached drawing)."]

1.	
2.	
3.	
4.	

Scope of Work



Tools for Communication

- Weekly Sales Ops – standing meeting
- Teams Channels for communication
- Training ***together***
- **Documented** process
 - ♦ Make sure tools we use are **Followed By All**
- Standardizing products
 - ♦ ...to deliver our services

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Thank you for your time.

Questions?

RATE THIS SESSION
ESXWEB.COM/FEEDBACK



CLOSING **LUNCHEON**

11:30AM

MAIN STAGE

F.L.Y. FIRST
LEAD YOURSELF

