

PSE SYSTEM REBUILD

The purpose of this study is to determine where we may find opportunities to reduce inconsistencies and redundancies in the PSE roof and window selling journey.



Administration Time

The average PSE / CPSE spends 20%-30% of the day completing administrative tasks. The use of multiple system has created redundant entries of similar information throughout the process.

Pricing Issues

Due to the pricing inconsistencies and usability of the Automated Pricing Tool and M2o, PSE's have developed a variety of pricing methods. This has led to inconsistent pricing and process.

PSE's and DMIS' agree that custom labor needs to be standardized. DMIS' favor eliminating the PSE's ability to adjust margins and create a flat pricing structure.

PSE's and some DMIS' have voiced concern over Lowe's markup of installer labor. The labor markup has resulted in a loss of roofing and window projects.

Needs & Wants

PSE's need reliable pricing and cohesive selling process. Below are some of the suggested features.

- Single program for in-home selling
- Ability to access info on cell phone
- Ability to skip proposal or go directly to contract
- 1 Click for in-home presentations
- Ability to tender in-home
- Ability to send pictures directly to installer
- Greater control over scheduling
- Standardized process for PSE's and installers

10 Interviews were conducted including PSE's, CPSE's and DMIS'

- 1 Group interview including 3 PSE's
- 4 PSE's interviewed individually
- 1 CPSE interviewed
- 1 PSE/CPSE Hybrid interviewed
- 4 DMIS interviewed individually



All interviews were 45-60 min sessions conducted remotely between 2/1/21 through 3/11/21.

Pricing

- Inconsistent pricing through Automated Pricing Tool has led to a variety of pricing methods such as vendor pricing sheets and PSE generated spreadsheets.
- Labor markup is too high and at times results in loss of jobs.
- Custom labor pricing needs to be standardized

Scheduling

- Automated scheduling has led to rescheduling appointments with customers.
- Current scheduling does not account for travel time or changes in daylight.
- Customers receive false cancellations on appointments.

Administration Time

- PSE's average 2 hours a day of admin work.
- Some information entered multiple times in IMS, M2o and Genisus.

Needs & Wants

- Ability to skip proposal or go directly to contract.
- Template or auto generated presentations used in the home.
- Additional payment options and in-home tendering
- Ability to send pictures directly to installer
- Roof calculator to produce supply list

Pricing

- Eliminate margin play and institute flat pricing
- Standardize installer pricing and custom labor
- Reduce labor markup and focus on product profitability
- Give 1 week window to tender promos

Consistency Issues

- PSE's need a cohesive selling process
- Automated Pricing Tool can be inaccurate and cumbersome to use
- Product delays causing issues
- Communication between installers and PSE's should be standardized

Administration Time

- PSE's currently spend 10/hr. or more a week on administration tasks
- Current system tools are cumbersome and time consuming

Needs & Solutions

- Single program for in-home selling
- Ability to access info on cell phone
- Consistent, standardized presentations for in-home
- Entry level window lines
- Present customers with options for in-home or virtual visits

Administration Time

Our PSE's currently spend roughly 25% of their time on administrative tasks. Many of the tasks are redundant and involve uploading and downloading of documents to several different systems. If we can connect these systems through a single platform and automate some of these redundant tasks, we could see a significant reduction in administration time.

Selling Process

Currently PSE's use a variety of programs, sales sheets and vendor supplied sales materials during their sales pitch and quoting process. Giving our PSE's a single program to guide customers to a final product selection, providing accurate pricing, automating the final presentation materials, and being able to go directly to signing and tendering the sale in-home could improve close rates and reduce the amount of time spent in the home.

Additional savings in time and expense could be seen if we gave our customers the option to meet remotely, in-store or in-home with our PSE's. This could reduce travel time and mileage costs.

Communication

The current IMS/LMS system presents a few challenges between PSE's and our customers. If we allow a little more flexibility for our PSE's to change appointments and control when the customer is notified via email, we could create a smoother experience for both.

Communication between PSE's and installers is muddled and could benefit from a standardized digital process. This could reduce errors and improve communication.

Pricing

Some additional investigation should be conducted by the business regarding competitive labor pricing. Some of our findings suggested that this could be due to competitive analysis not being granular enough. Many PSE's and some DMIS' have also questioned if the markup on labor is too high, resulting in a loss of sales.

Both PSE's and DMIS would like to see standardization of custom labor pricing.

APPENDIX



PSE AFFINITY MAPPING



Pricing Issues

Labor is too high	Labor is marked up so much	Labor markup too high
Competitors have cheaper labor	Does not trust pricing tool	Pricing tool has cost them money
Dose not trust Pella pricing sheet	Don't have proper pricing in the field	Uses pricing sheet from vendors
Uses printed copy of Pricing	Pricing Tool needs accurate pricing!	Genisus undermark prices
Increase margins	Margins are too slim	Need a cheaper line of windows
Need Predictable contractor pricing	Need accountability with installers	Custom labor should be standard-

Wants

Need strait to contract, skip prop	Want's to skip proposal go to contract	Generic template for proposals
Ability to send pictures to contractor	Need 2nd party credit easier to qualify	Tender in home
Would like more Payment options	Military or employee discount in software	Roof Calculator to give material list
Wants to leave quote at home	Want's to pick based on brand	Need a grace period on promos
Want's App of the installer sheet		

Websites Used

Uses ReliaBuilt quick tool	Use google street view	Uses Tax site for measurements
Uses Google house with road view		

Scheduling

Need Control over schedule	Need flexibility in schedule	Drive time not accounted for
Schedule is too ridged	Looks unprofessional to reschedule	Daylight not taken into account
Has to use 3 calendars	Customers get false emails on changes	

Apps Used

App used Pitch collaborator	App used Margin Genie	App used One Note
App used Margin Genie	Uses Pella ADM tool	Uses Pella quick tool

IMS/ Paperwork

Hour worth of IMS	IMS 1-2 hours a day on paperwork	LMS questions need to be reduced
Still uses written proposals	IMS not user friendly	

EagleView / Hover

Multiple layers not covered by EagleView	Likes EagleView	Does not like Hover
EagleView only 50% complete	30% partials on EagleView	

M2o

M2o used for doors, frustrating to use	Use M2o in the home	Not using M2o and APT in the home
Only use M2o on odd windows	M2o only after final measure	

Key

PSE User 1	PSE User 2	PSE User 3	PSE User 4
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DMIS AFFINITY MAPPING



Needs/ Solutions

Likes 1 Click	Likes 1 Click, products selected
Need an in-home selling tool	Compact everything in 1 program
PSE's need IMS on cell	Need to focus on sales funnel
Style quiz ahead of in home visit	Need entry level window lines
PSE's use Pella Mill Guard selling tools	Admin fee for PSE services?
PSE love e-contracts	Customer choose in person/ virtual
Central support for PSE's	Likes Roof in a box

Pricing Issues

Remove margins flat pricing	Straight across pricing for PSE's
Flat pricing	Standardized custom labor
Pricing from install inconsistent	Better control on installer pricing
Focus on product profit not labor	PSE's playing with margins
Pricing margin increased to comm	Pricing a little high on roofing
Introduce dynamic pricing	Why is labor marked up 30%
1 week tender on promos	

Consistency

We need a cohesive selling process	1 in 25 errors PSE/Install bad docs
Lead time, supply chain issues	Product delays causing issues
M2o lacks items for windows	APT can be a nightmare
United inches causes issues	Bandwidth issue in stores

Admin Time

Admin workload 10hr./week	Admin 2/ hr. a day
PSE admin time 20% or more.	Admin tasks 10/ hr. week
System and tools are cumbersome	Streamline paperwork

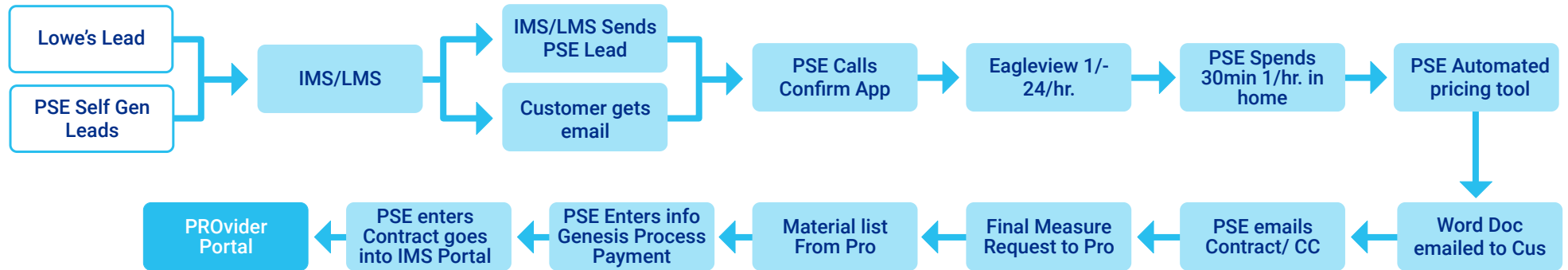
Installer Issues

PSE and Installer Miscommunication	Pricing work sheets gaps
PSE and Installer Product standards	Installers delayed time frame

Key

DMIS User 1	DMIS User 2	DMIS User 3	DMIS User 4
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PSE CURRENT ROOF FLOW



The flow shown above represents the current suggested workflow. Most PSE's deviate from this path due to inconsistencies in process, pricing and lack of digital support.

PSE CURRENT WINDOW FLOW



The flow shown above represents the current suggested workflow. Most PSE's deviate from this path due to inconsistencies in process, pricing and lack of digital support.