For new quotes / new projects / new jobs

- Lead generation
- **Stakeholders:** Sales Team, Leadership Team

- Estimators collaborate across stakeholders to develop quotes. **All quotes processed through AQ**
- **Stakeholders:** Estimators, Sales Team, Leadership Team, Vendors, and 3rd party partners

Measures to mitigate tariff
- Tariff-related language included in AQ
- AQ is regularly updated to reflect the most current costs, including tariff adjustments

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- **Re-run ALL AQ before contract closure**
- Negotiations; **finalize contract terms with all involved parties**
- **Customer sign off on re-run AQ**
- **Kickoff meeting to transition project from Estimators to PM & PC**
- Stakeholders: Estimators, Sales Team, Leadership, Legal, and Contract Admin

Measures to mitigate tariff
- Re-run AQ before contract closure
- Customer sign off on re-run AQ

- After completion, site punch list is finalized, and billing is issued
- AP team performs a **3-way match** (PO, goods receipt, and invoice). Discrepancies result in short payment and escalated to Purchasing & Sales for resolution
- AR team follows standard process to collect outstanding payments
- **Stakeholders:** Contract Admin, AP, AR, Purchasing, PM, PC, Sales

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- The PM and PC maintain an offline tracker to monitor project cost and profitability
- Any **discrepancies are addressed through vendor negotiations or customer change orders**
- **Stakeholders:** Purchasing, PM, PC, Sales, Contract Admin

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- POs are issued to vendors, and confirmation is obtained
- **Discrepancies** between PO and vendor confirmation **are escalated to purchasing, PM, PC, or Sales for resolution**
- Resolution may involve **vendor negotiations or customer change orders**. Vendor pricing is not altered until resolution
- **Stakeholders:** Purchasing, PM, PC, Sales, Contract Admin

Measures to mitigate tariff
- If early procurement is required, apply a 100% advance along with applicable storage fees

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- Perform a final review of AQ to ensure data accuracy
- **Once validated, AQ data is imported into ERP, and POs are generated accordingly**
- **Ensure that PO value precisely matches the corresponding AQ data before processing**
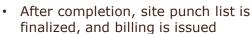- **Stakeholders:** PM, PC

Measures to mitigate tariff
- Include language in PO to ensure confirmation. Enforce PO confirmation

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⚡ - indicates potential check points to ensure tariff pass through to customer

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For existing quotes / existing projects / existing jobs

- Perform a final review of AQ to ensure data accuracy
- **Once validated, AQ data is imported into ERP, and POs are generated accordingly**
- **Ensure that PO value precisely matches the corresponding signed off AQ data before processing**
- **Stakeholders:** PM, PC
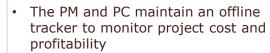
Measures to mitigate tariff
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Measures to mitigate tariff
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