**KMS Estimator Training Manual**

**Introduction**

Thanks for beginning the process of becoming an endorsed estimator with Kearney Moving Service. This manual will take you step by step through every detail of local, intrastate and interstate job estimating. Before reading further please find the ‘Estimator Training Check List’ included with this manual/estimating documents. This list is required to complete for you to become endorsed and it will help guide you through the training process.

**Approach and Philosophy**

Kearney Moving pursues excellence and professionalism in all we do. The position of estimator is one the most essential in our organization. The estimator must have a combination of common sense sales ability and a highly detailed understanding of the moving process. Please pay close attention to all information and instructions in this manual.

We recommend that you read the entire manual from beginning to end. Before following the instructions in this manual it is important that you are familiar with the complete process. After reading every page go through a second time completing each assigned task.

**Getting Started**

**This training process will take you through five key areas.**

**1. Read, Study, Pass Written Tests**

Most of the knowledge you will need as an estimator is contained in this section. It is important to master this information.

**2. Off-Site Practice (Done at Warehouse/Previously Estimated Residence.)**

Before going to an actual estimate we will work with you to practice the techniques needed to estimate accurately.

**3. Shadow with an Experienced and Endorsed Estimator,**

You will be able to watch the process live. Also you will apply some of what you have learned and practiced with a potential customer.

**4. Launch Solo with Office Phone Support**

After completing the shadowing experience you will do your first set of estimates. Phone support will be included during your time at the residence.

**5. Have -- number of Successful Estimates and Receive KMS Endorsement.**

After you have completed these estimates within the KMS standards you are ready to estimate on your own and hopefully with experience you will train others.

**1. Read, Study, Pass Written Tests**

**In this Section:** Process Overview, Documents in Customer File, Furniture Types, Carton Types, Written Tests.

It is essential that you get a clear understanding of the information in this section. We have actually created several tests at the end to help you master the content.

**A. Overview of Entire Process**

**Customer Service:** In order to be a successful estimator you must already understand sales and marketing that is service oriented. Our main focus in the estimating process is to build rapport, inform, and answer questions. This is a vital part of the sales process but we do not push or pressure them in any way. The goal is to be both professional and personal. The estimator is often the first face from KMS that people see. We want the estimating experience to reflect our core values of Quality, Integrity, and Service.

**Dress Code:** How you present yourself physically is very important. We want to present a professional image. You must wear a Kearney Moving polo or button up shirt. We wear pants that are business casual, either khakis or slacks but no jeans. For the guys your hair must be clean-cut and facial hair must represent a business environment (no funky sideburns etc.) Lady’s hair should be well groomed and professional. You should maintain excellent personal hygiene and otherwise follow the Kearney Moving dress code.

**Step-by-Step Process:** It is important as an estimator that you follow each detailed step of the following process.

**1. Before leaving for the residence**

Check customer file(s) to ensure all necessary documents and information is included. Check the new client information sheet for any special instructions requested for the estimate.

**2. Understand map directions and make sure vehicle has fuel**

As professionals it is important that we arrive exactly on time. Make sure your watch is accurate, the car has plenty of fuel, and you understand the directions to the residence. Plan to drive by the house approximately five minutes before the appointment, park a couple of blocks away, review file, then return to house promptly at the exact appointment time.

**3. Greeting**

Park on the street in front of the residence and not in their driveway. If no space is open then park down the street and walk to the house. Knock on the front door three times firmly. Step away from the door three steps and turn sideways. Don’t stare at the door or in a window because it may frighten or startle the customer. Introduce yourself by stating, “Hi I am (your name) with Kearney Moving.” Then ask if they are (customer’s name.) Only enter the door after being invited in by customer. Ask if you need to take off your shoes to not get any carpet dirty. Use appropriate small talk to establish rapport. Put customer at ease through politeness, kindness and professional body language.

**4. Explain Survey Process to the Customer**

Going through the house and talking with the customer is called the “survey.” Explain the survey process step-by-step. First, tell about the Table of Measurements Tallying. Some customers will explain various move needs in detail, others will just let you do this alone. So be responsive to each varying situation. Next, tell the customer that after tallying you will both need a table or countertop to discuss the survey forms and company flyers. Encourage the customer to ask questions or tell you anything at anytime during the survey.

**5. On-Site (Inside Residence) Portion of the Table of Measurements**

**Tally**

Strategically go through the house room by room according to customer’s instructions. If it is a multi-level residence pick appropriate floor to begin and complete all tallying on that floor before moving to next floor. Determine a logical room-by-room plan for completing the floor.

Tallying. After entering room pick a starting point in the room. First, tally furniture by going in a clockwise direction around the room. Second, begin again from starting point and tally ‘Packed by Owner’ (PBO) cartons in the room. Then estimate the amount of ‘Carrier Packed’ (CP) cartons needed. Accurately estimating CP cartons is a critical skill to learn. Accurately estimating carton needs can make or break the sale. A similar ability is determining crated item dimensions. You will enter crating information on the orange survey sheet during the tallying process. Do not do totaling until you have left the residence. You will learn specifically how to do the tallying and carton/crating estimating later in this training process.

**6. Consult with Customer to Complete the Survey Sheet**

When tallying is complete, meet with customer at the kitchen table or a counter top. Do not sit informally in the living room, this makes it difficult to explain the paperwork and also lowers the professional/sales atmosphere of the estimation. Ask customer questions relevant to the survey sheet. Enter Customer Information, General Information, All Origin and Services Information, and Destination Information. Do not complete the ‘Other Information/CR’ until you have left the residence.

\*\*we need to adjust wording on orange sheet so customer can see it

**7. Explain Company Flyer and Customer Prep Sheet**

Give customer the KMS Referral Flyer. Explain that this gives highlights about KMS and includes customer testimonies. Give customer the ‘Are You Ready for Moving Day?” Sheet. Discuss each item with customer and emphasize items personally relevant to their move. Double check for any other questions and prepare for departure.

\*\*\*we need to revise the AYRFMD sheet to include all info needed

(decide on either bullets or check boxes) keep info positive

**8. Departure**

Stand up from the table and begin walking with customer to the front door. State the following as closely as possible:

*“Well, thank you for your time. I will get this into the office. We will get your*

*estimate to you as soon as possible, typically it takes one or two days. If you have any questions feel free to call the office and ask for the Customer Service Manager (currently Roger, 2/2013.) I just want to let you know Kearney Moving would love to have your business. If you don’t have any other questions I think we are done.”*

Then make appropriate small talk and leave.

**9. In Car After Survey**

After leaving the residence immediately fill out any incomplete sections of the documents in the customer’s file. If notes were taken during the survey make sure they are legible and complete.

**10. Sales Manager Meeting After Survey**

The final part of the estimate is consulting with the sales manager. This is done face to face, over the phone, or via skype. When the sales manager has received the customer file (hard copies or electronically) go over each document to clarify any notes or special information. When this meeting is complete you are finished with the estimate. You will receive feedback about your accuracy after the move is complete.