
BALANCE TO BASELINE



BID PILLAR WORKBOOK

Sell - Quoting, Customer Approval, NTE Management, Brand & Reputation

Interior Climate Solutions
Meet the baseline. Not more. Not less.
Be In Balance.

The Balance to Baseline™ Framework - © 2026 Kirk E. Barrett / Cimbrian, Inc.

The Balance to Baseline Approach

Balance to Baseline is an operating philosophy that assigns a measurable standard (a baseline) to every activity in the company and holds the entire organization accountable to meeting that standard. Not exceeding it recklessly. Not falling short of it quietly. Meeting it. Consistently. Predictably. In balance.

The Employee-Up Principle: This workbook is built on a fundamental belief: the people who do the work are the best people to document the work. Management does not write your SOPs. YOU do. You are the expert in your process. You know the steps, the shortcuts, the pitfalls, and the nuances that no manager sitting in an office could capture. When you document your process, you own it. When you own it, you take pride in it. When you take pride in it, you improve it. That is Balance to Baseline.

How This Workbook Works

This workbook contains task worksheets for every baseline that must be established within the BID Pillar. For each task:

1. **A Process Owner is assigned.** This is the employee who currently performs or is closest to this work. They own the documentation.
2. **Items to Define are listed.** These are the specific decisions, metrics, values, or standards that must be established. Fill in the “Baseline Value / Decision” column.
3. **An SOP Framework is provided.** For every process, the owner documents the step-by-step procedure using the standard template. This becomes the official SOP.
4. **Management reviews and approves.** The owner presents their completed worksheet to peers and leadership. Feedback is incorporated. The SOP is published to the central repository.
5. **The owner maintains it forever.** When the process changes, the owner updates the SOP. Ownership can be transferred, but the principle remains: the person who does the work owns the documentation.

Completing a Task Worksheet

Step 1 - Read the task description. Understand what baseline needs to be established and why it matters to the business.

Step 2 - Fill in ownership. Management assigns the Process Owner (employee) and the Reviewer (manager). Set a target completion date.

Step 3 - Answer every question in the Items to Define table. Be specific. Write numbers, not feelings. “48 hours” not “quickly.” “85%” not “high.” If you don’t know the answer, write your best estimate and flag it for discussion.

Step 4 - Document the SOP. Using the framework provided, write the step-by-step process as if you were teaching a brand-new hire who has never done this before. If they can follow your steps and produce the right result, your SOP is good.

Step 5 - Present and get approved. Share your completed worksheet with your team and your manager. Accept feedback. Revise. Get the final sign-off. Your SOP is now official.

The BID Pillar: Sell - Quoting, Customer Approval, NTE Management, Brand & Reputation

The Bid Pillar governs how ICS converts opportunities into approved, budgeted work. Every quote is a promise of scope, quality, and cost.

Balance to Baseline demands that quotes are precise reflections of the flat-rate books, that customers approve through their portals before work proceeds, that NTE increases are managed proactively, and that our brand and reputation reinforce trust in those promises. **This pillar is where revenue begins.**

B-to-Baseline areas in this pillar:

- **Bid to Baseline:** Quoting accuracy, turnaround, and flat-rate book compliance.
- **Buy to Baseline (Approval):** Customer approval, NTE management, and portal signoff.
- **Brand to Baseline:** Marketing, PR, and external identity consistency.
- **Believe to Baseline:** Customer trust, reputation, and vendor scorecards.

Task Index

#	Task	B-to-Baseline Area	Owner	Status
13	Standardize Quote Template & Format	Bid to Baseline		
14	Set Quote Turnaround SLAs	Bid to Baseline		
15	Establish Quote Accuracy Feedback Loop	Bid to Baseline		
16	Define NTE Management Procedure	Buy to Baseline (Approval)		
17	Standardize Customer Approval Workflow	Buy to Baseline (Approval)		
18	Define Brand Guidelines	Brand to Baseline		
19	Establish Customer Satisfaction & Scorecard Tracking	Believe to Baseline		
20	Set Annual Marketing Budget & Plan	Brand to Baseline		

TASK 13: Standardize Quote Template & Format

Create the standard quote template used for all proposals. Every quote must include scope, Service Request Code, task hours, Parts Kit reference, total price, and validity period.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What fields are required on every quote (scope, SRC, hours, parts, price, validity)?	
2	What is the standard quote format for portal customers vs. direct customers?	
3	What approval thresholds require manager review before submission?	
4	What is the quote numbering system?	
5	How are quotes linked to the flat-rate Tasks Book and Jobs Book?	
6	What margin targets are built into quoted pricing?	
7	What is the quote validity period (30 days? 60 days?)?	
8	How are change orders documented when scope changes after initial quote?	
9	What system/tool is used for quote generation?	
10	How are declined quotes tracked and analyzed?	

SOP Documentation Framework:

The employee who owns this process documents it below. This becomes the official SOP. You do the work - you write the steps. Management supports, but YOU own it.

Process Name	
Purpose (Why does this process exist?)	
Trigger (What starts this process?)	
Inputs (What do you need before starting?)	
Step-by-Step Procedure	1. 2. 3. 4. 5. 6. 7. 8.
Tools / Systems Used	
Output (What is produced?)	
Handoff (Who gets it next?)	
Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 14: Set Quote Turnaround SLAs

Define the maximum turnaround time from tech diagnostic to quote submitted on customer portal, based on urgency level.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the turnaround SLA for emergency/critical quotes (freezer down, hot store)?	
2	What is the turnaround SLA for standard break/fix quotes?	
3	What is the turnaround SLA for PM quotes?	
4	What is the turnaround SLA for project/install quotes?	
5	What is the turnaround for a return-trip quote after diagnostic visit?	
6	How is turnaround measured (tech submission of findings to quote on portal)?	
7	What happens when turnaround SLA is missed - escalation procedure?	
8	How is quote turnaround tracked as a metric?	
9	What staffing is needed to meet turnaround SLAs at current and projected volume?	
10	What is the after-hours quoting procedure for emergency work?	

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Common Mistakes to Avoid	
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Notes / Additional Context:

TASK 15: Establish Quote Accuracy Feedback Loop

Create the process for comparing actual job hours and parts costs to quoted amounts, feeding data back to the estimating team to improve flat-rate accuracy.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	How frequently is quote accuracy reviewed (weekly, monthly)?	
2	What is the acceptable variance between quoted and actual hours (+/- %)?	
3	What is the acceptable variance between quoted and actual parts cost (+/- %)?	
4	Who reviews the data (estimating team, service managers, both)?	
5	What triggers a flat-rate book update (consistent variance on a job type)?	
6	How many data points are needed before adjusting a flat-rate (minimum sample size)?	
7	How is the feedback communicated to the quoting team?	
8	How are one-off outliers distinguished from systemic inaccuracies?	
9	What is the procedure to add a new job type to the flat-rate Jobs Book?	
10	Who approves flat-rate book changes?	

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Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 16: Define NTE Management Procedure

Document the complete Not-to-Exceed (NTE) management workflow from initial job acceptance through NTE increase requests, including the tech-to-portal communication chain.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the standard NTE threshold set by each major customer?	
2	At what point must a tech notify their SM that they may exceed NTE?	
3	What is the communication chain: Tech → SM → Dispatch → Portal?	
4	What information is required in an NTE increase request (current NTE, requested NTE, justification, revised scope, estimated time)?	
5	What is the target turnaround from tech notification to portal submission (target: 1 hour)?	
6	What does the tech do while waiting for NTE increase approval (continue? stop? safe wrap-up)?	
7	How is NTE increase approval communicated back to the tech?	
8	What is the procedure if NTE increase is denied?	
9	How are NTE increase approval rates tracked by customer?	
10	What is the documentation retained for NTE increases (for invoice support)?	

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Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 17: Standardize Customer Approval Workflow

Define the hard rule that no work begins without documented customer approval through the appropriate portal or written authorization.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the minimum job value requiring written approval (vs. verbal for small jobs)?	
2	What constitutes valid approval (portal approval, email confirmation, signed quote)?	
3	How is approval documentation linked to the job record and invoice?	
4	What is the procedure for emergency work where approval may be delayed?	
5	How are verbal approvals documented and by whom?	
6	What is the approval documentation audit process (monthly)?	
7	What happens when a job is invoiced without proper approval documentation?	
8	How are approval documents made available to billing for invoice support?	
9	What is the approval turnaround SLA we request from customers?	
10	How do we track approval turnaround by customer for proactive relationship management?	

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Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 18: Define Brand Guidelines

Document the visual and messaging standards that define ICS's external identity across all touchpoints.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the official logo and its usage rules (sizing, clear space, backgrounds)?	
2	What are the brand colors (primary, secondary, accent)?	
3	What fonts are used in materials (print, web, proposals)?	
4	What is the brand tone of voice (professional, reliable, precise)?	
5	What are the key messaging pillars (national coverage, Balance to Baseline, reliability)?	
6	What are the standards for truck graphics and wraps?	
7	What are the uniform standards?	
8	What are the proposal and quote document branding standards?	
9	What is the website update cadence?	
10	Who approves new materials for brand compliance?	

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Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 19: Establish Customer Satisfaction & Scorecard Tracking

Define how customer satisfaction is measured, how vendor scorecards from property management firms are tracked, and how feedback drives improvement.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What customer satisfaction survey method will be used (post-job automated survey)?	
2	What is the satisfaction score target (NPS, CSAT, or star rating)?	
3	Which customer portals provide vendor scorecards and how often?	
4	What scorecard metrics does each major customer track?	
5	What is the minimum acceptable scorecard rating for each customer?	
6	What is the response procedure for negative feedback (target: 48 hours)?	
7	How is satisfaction data shared with the team?	
8	How are online reviews monitored and responded to?	
9	Who maintains the reference customer list?	
10	What is the escalation procedure when a scorecard metric drops below threshold?	

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Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 20: Set Annual Marketing Budget & Plan

Establish the marketing budget, quarterly milestones, and measurable objectives aligned to the growth plan.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the annual marketing budget?	
2	How does budget break down by activity (digital, trade shows, print, referral programs)?	
3	What are the quarterly marketing milestones?	
4	What lead sources are tracked and what is the ROI target for each?	
5	What is the target number of new customer acquisitions per quarter?	
6	How is marketing ROI measured and reported?	
7	What is the social media posting cadence and who owns it?	
8	What trade shows or industry events will ICS attend?	
9	What customer retention marketing activities are planned (appreciation events, reviews)?	
10	Who owns marketing execution and reporting?	

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