

HAWORTH®



DealerLink
Program Manual





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Program Highlights

The success of our business depends on satisfied customers, which is why we actively listen to our customers and their evolving needs, translating these needs into best-in-class products and services. Our philosophy of continuous quality improvement is integral in completely satisfying our customers' needs. The DealerLink Program exemplifies this continuous improvement philosophy.

Benefits of the program include:

- **One Point of Contact** – The dealer placing the order will coordinate the customer's installations across North America, resulting in customer satisfaction as evidenced by consistent, total quality sales and service support.
- **Network of Haworth Dealers** – Haworth dealers are located in markets throughout North America, thus providing a professional vehicle for dealer communication.
- **Consistency** – Through participation and commitment to Haworth's dealer programs, Haworth dealers provide the same high level of sales and service support throughout North America.
- **Haworth Sponsorship** – As an integral part of the order fulfillment process, the DealerLink program is a strategic initiative to completely satisfy our customers. As such, Haworth has established a corporate lead DealerLink team dedicated to supporting the unique needs of our multi-location customers.
- **Professionally Trained Installers** – Haworth dealers subscribe to Haworth's Installation Certification Program. Through a continuous review and audit process, this program ensures that Haworth dealers continually meet requirements to properly install Haworth product to customer specifications and satisfaction.
- **Ease of Doing Business** – By developing a foundation of fully trained dealers located throughout North America, a dedicated support infrastructure, and a commitment to customer satisfaction, Haworth has provided our customers an opportunity to simplify their investment in Haworth furniture. The DealerLink program effectively and efficiently packages Haworth's expansive dealer network into one furniture source.

Haworth's DealerLink Program ensures that our customers consistently receive the highest level of sales and service support across North America, regardless of where the order is placed or the furniture is installed. The program facilitates teamwork among a North American network of Haworth certified dealers. This teamwork results in Haworth's ability to uniformly support a customer's request to ship and install product to multiple locations regardless of where the product is ordered.

It is our philosophy that customers are best serviced by the local dealer. In support of this philosophy, the DealerLink program provides a process through which dealers closely align themselves with one another to meet the customer's needs. Therefore, the customer can place all orders with one dealer and be assured that the product will be professionally and consistently serviced wherever it is installed.

The goal of Haworth's DealerLink Program is total customer satisfaction. To support this goal, dealer participation qualifications and responsibilities have been detailed while Haworth's internal DealerLink team provides Haworth dealers the communication and project management tools needed to achieve superior performance.

Haworth is committed to continuously improve the quality and effectiveness of our dealer network. Our pursuit of excellence requires continual focus on timely response to the ever-changing needs of our customers. The DealerLink program represents Haworth's commitment to customers. To learn more about the DealerLink Program, please contact your local Haworth dealer or representative or email dealerlink@haworth.com.

The Five-Step Approach



Step 1 – The Selling Dealer selects an Installing Dealer, taking into consideration the customer location(s), the DealerLink qualifications, and the customer’s requirements.



Step 2 – The Selling Dealer supports and facilitates the customer’s furniture management process, including project planning, design, specification, and procurement.



Step 3 – The Selling Dealer leads the project management process, coordinating the efforts of the Installing Dealer and Haworth DealerLink team, which includes preparation and submission of all project documentation.



Step 4 – The Installing Dealer completes installation responsibilities to the customer’s satisfaction, on time and within budget.



Step 5 – The Haworth DealerLink team reviews the quality of the project to ensure that the DealerLink program standards were met.

Dealer Qualifications

The DealerLink qualifications are established as prerequisites to provide consistently high levels of installation related services, thereby promoting customer satisfaction.

Installing Dealers commit to:

1. Comply with all terms and conditions of the Haworth Dealer Agreement and all programs in which the dealer participates, or is expected to participate.
2. Designate non-commissioned employees (e.g., Project Manager) to be responsible for coordinating and administering inbound DealerLink orders.
3. Manage all administrative responsibilities to ensure accuracy, completeness, and proper response time.
4. Provide insurance for public liability, including products, operations, and contractual liability; worker's compensation; property damage with minimum limits of \$500,000; transportation vehicles; and occupational disease. Insurance coverage should be maintained for any merchandise in their care or control. This period of responsibility extends from physical receipt of the product to installation and final approval (Sign-Off Agreement) by the customer.
5. Use Haworth certified installers in accordance with Haworth's Installation Certification Program. If the Installing Dealer does not maintain their own installation crew and utilizes an outside installation company, the outside installation company is to be Haworth certified. The installation supervisor(s) is/are to be Haworth certified.
6. Ensure timely completion of all responsibilities according to scheduled dates (Dealer-to-Dealer Checklist/Project Management).
7. Maintain adequate warehouse storage space to accommodate at least one truckload of furniture per customer, based upon a separately negotiated rate.
8. Own a delivery vehicle (or available rentals) with appropriate furniture handling tools and equipment.
9. Maintain an inventory of tools and equipment, touch-up paint, wood touch-up capabilities, spare replacement parts, and other hardware normally required to properly install Haworth product.
10. Maintain and use computer-aided design tools or have access to readily available contractors, if this service is required.
11. Perform all Installing Dealer responsibilities according to the DealerLink Program.
12. Each dealer maintains a written statement of capabilities to perform DealerLink installations.



Selling Dealer Responsibilities

1. Help the customer evaluate and specify the furniture.
2. Provide design consultation.
3. Select an Installing Dealer before order entry. Agree to a list of Installing Dealer responsibilities and record these on the Dealer-to-Dealer Checklist. Also record the agreed upon fee for these services on the DealerLink Compensation Agreement.
4. Procure mockups if necessary.
5. Use Haworth's Symbols Library and AutoCad, Cadvance, Quickscape, Symbols Library with AutoCAD, CET Designer, or another equivalent design software approved by Haworth to prepare design specifications.
6. Close the sale.
7. Prepare purchase orders, including takeoffs.
8. Coordinate the submission of the purchase order and the DealerLink Compensation Agreement. The Compensation Agreement should be submitted to Haworth's DealerLink department (with the Haworth order number) within 48 hours of order acknowledgment. If the DealerLink Compensation Agreement is not prepared at order entry, indicate the name of the Installing Dealer in the notes of the Electronic Order Processing (EOP) transmission.
9. Review the installation package with the Installing Dealer to ensure a complete understanding of its contents.
10. Verify all purchase orders and acknowledgments for accuracy.
11. Coordinate order changes and, if necessary, obtain and submit revised purchase orders.
12. Coordinate and communicate the shipping schedule with Haworth's customer service department and the Installing Dealer.
13. Prepare and forward an installation package to the Installing Dealer four weeks before shipment for normal lead-time orders and two weeks for RUSH orders. The installation package should include:
 - installation drawings
 - packaging instructions
 - copy of purchase order
 - delivery instructions
 - electrical plan/requirements
 - contact names, phone number, and email address for your dealership's Dealer Coordinator and a customer contact person
 - all other information necessary to properly install the project
14. Coordinate any design changes and inform the Installing Dealer within 48 hours of the changes. Provide any backorder or shortage information to the Installing Dealer.
15. Expedite and coordinate add-on orders and, if necessary, obtain and submit revised purchase orders.
16. If the Selling Dealer holds the purchase order, they are to invoice the customer for products and services.
17. If the Selling Dealer issues the purchase order to Haworth, the Selling Dealer will include a line item for installation that equals the installation amount agreed to on the DealerLink Compensation Agreement. If the amounts do not match, the Selling Dealer is responsible for submitting an amendment to the purchase order within 48 hours of Haworth's request. The Selling Dealer will pay Haworth the installation amount within terms upon invoicing.
18. File all freight claims and monitor the claim until complete.
19. File all warranty claims (observing Haworth's no-fault policies with the understanding that the Selling Dealer is responsible for these costs) and monitor the claim until complete.
20. Complete Haworth's Quality Survey and submit to Haworth within five days of completing the installation (excluding add-on orders).

Installing Dealer Responsibilities

1. Review the installation package information with the customer within one week of receipt of the package.
2. Conduct pre- and post-installation meetings with the customer.
3. Communicate any delivery requirement changes to the Selling Dealer within 72 hours of changes.
4. Confirm the delivery date with the customer 48 hours before delivery and deliver the product on the scheduled delivery date(s).
5. Communicate any state tax on services to the Selling Dealer as soon as possible.
6. Receive and check product. Coordinate and communicate any damaged or replacement product related information to the Selling Dealer within 48 hours of receipt.
7. Take field measurements and inspect the site (accessibility, disposal facilities) within one week of receipt of the installation package. Notify the Selling Dealer of any problems within 48 hours of taking the field measurements.
8. Coordinate the involvement of other trades and attend construction trade meetings.
9. Project manage the installation process. (Dealer-to-Dealer Checklist)
10. Install the product.
11. Perform a walk-through with the customer involving an on-staff certified installer.
12. Dispose of all refuse from the job site.
13. If the customer requests product orientation, review the request with the Selling Dealer and Haworth's local Market Manager. The Selling Dealer decides who will provide the product orientation. If the Installing Dealer is requested to perform this, the Installing Dealer's Coordinator or other non-quota-bearing personnel will provide the product orientation.
14. Receive less than truckload (LTL) orders and deliver to the job site within 72 hours when drop shipments are not possible.
15. If the customer requests or requires change orders, direct them to the Selling Dealer's Coordinator to procure the order and complete any work related to the change order after approved by the Selling Dealer.
16. Prepare a punch list and submit it to the Selling Dealer within 48 hours of a walk-through.
17. Obtain the signature of the customer on the Sign-Off Agreement and forward the original to Haworth and a copy to the Selling Dealer. The name of the Selling Dealer is to be completed before obtaining the customer's signature.
18. Provide any fee-based post-installation service required (e.g., add-on orders, maintenance, reconfiguration, warranty) only after approval by the Selling Dealer. The same document process would apply if necessary, i.e., Dealer-to-Dealer Checklist, DealerLink Compensation Agreement/DealerLink Confirmation.
19. Coordinate and communicate any damaged or replacement product related information to the Selling Dealer within 24 hours of identification on the job site.
20. Complete Haworth's Quality Survey on the Selling Dealer and submit to Haworth along with the Sign-Off Agreement and an invoice within five days of completing the installation (excluding add-on orders). Haworth's receipt of all three is required to process payment for services.
21. Satisfactorily meet the DealerLink qualifications on a continual basis.

Program Documentation

Dealer-to-Dealer Checklist

This form, initiated by the Selling Dealer, supports the compensation discussed between the Selling and Installing Dealer by clearly identifying which dealer is responsible for what activity. In addition, the document supports project management duties for each dealer by identifying completion dates for each activity.

Quality Survey of the Selling/Installing Dealer

The Selling and Installing Dealer complete the quality survey at the conclusion of each project. The survey measures the performance of both parties. Haworth uses this information to support corrective action initiatives. Submission of this survey, along with the Sign-Off Agreement, is necessary to process the Installing Dealer's installation invoice.

Sign-Off Agreement

The Sign-Off Agreement is signed by the customer's representative at the conclusion of the installation, indicating that the customer accepts the installation of Haworth products as complete and meeting the specified requirements. To ensure prompt payment, the Sign-Off Agreement, along with the Quality Survey, are submitted with the Installing Dealer's invoice.

Drop Shipment Waiver

This document, submitted by the Selling Dealer, represents that the customer has requested the product be shipped per their instructions and that the customer will handle the installation related activities independent of any Haworth dealer. One waiver should be submitted per customer per Market.



Compensation Agreement

Customer _____ Purchase Order #(s) _____

Haworth Order Number _____

Sold To Location (city, state) _____

Installing Dealer Location (city, state) _____

Install Location (city, state) _____

Selling Dealer & Coordinator _____ Dealer # _____

Phone # _____

Email Address _____

Installing Dealer & Coordinator _____ Dealer # _____

Phone # _____

Email Address _____

This form documents the responsibilities that the Selling and Installing Dealers have agreed to perform for the above project and the amount of compensation the Installing Dealer shall receive for satisfactorily completing the responsibilities. Please return the completed form to dealerlink@haworth.com.

We, the undersigned Haworth Dealers, agree to perform our respective responsibilities as the Selling and Installing Dealers outlined in the Haworth DealerLink Program Manual and documented on the Haworth Dealer-to-Dealer Checklist.

The Installing Dealer's compensation will be \$ _____

Installation fees will be paid by (please mark one) Haworth Selling Dealer

Accepted and Agreed by:

By _____ Selling Dealer Date _____ By _____ Installing Dealer Date _____

DealerLink Confirmation (to be completed by Haworth)

Haworth Order #(s) _____

Haworth confirms that the compensation fee to be paid to the Installing Dealer for the above DealerLink order(s) will be \$ _____ or _____ % of list provided that the Installing Dealer has satisfactorily completed dealer responsibilities and submits a properly completed Sign-Off Agreement and Quality Survey upon completion of the transaction.

By _____ DealerLink Administrator Date _____

Dealer-to-Dealer Checklist

Customer _____ Purchase Order # _____

Selling Dealer _____ Installing Dealer _____

Selling Dealer Coordinator/Phone # _____

Installing Dealer Coordinator/Phone # _____

Typical Selling Dealer Responsibilities

1. Help the customer evaluate and specify furniture/services required.
2. Procure mock-ups if necessary.
3. Provide design consultation to the customer.
4. Select an Installing Dealer.
5. Close the sale.
6. Prepare purchase order, including take-offs.
7. Complete/submit the DealerLink Compensation Agreement.
8. Forward an installation package to the Installing Dealer.
9. Review the installation package with the Installing Dealer.
10. Coordinate any design changes.
11. Coordinate and communicate the shipping schedule.
12. Verify purchase orders and acknowledgments for accuracy.
13. Coordinate order changes.
14. Issue or obtain necessary purchase order amendments.
15. File freight claims and monitor until complete.
16. File all warranty claims and monitor until complete.
17. Complete Haworth's Quality Survey on the Installing Dealer.

Completion Target Date

Completion Date

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Typical Selling Dealer Responsibilities

1. Take field measurements/inspect site.
2. Review the installation package data with the customer.
3. Conduct pre- and post-installation meetings with the customer.
4. Coordinate the involvement of other trades.
5. Communicate delivery requirements.
6. Communicate any state tax on services.
7. Confirm the delivery date with the customer.
8. Receive and check product.
9. Communicate any damaged/replacement product information.
10. Deliver and install the product.
11. Communicate any damaged/replacement product information.
12. Dispose of all refuse from the job site.
13. Perform walk-through with the customer.
14. Prepare a punch list and submit it to the Selling Dealer.
15. Install replacement parts/complete installation.
16. Obtain the customer's signature on the Sign-Off Agreement.
17. Complete Haworth's Quality Survey on the Selling Dealer.

Completion Target Date

Completion Date

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Sign-Off Agreement

End User _____

Haworth Installing Dealer _____

Haworth Market Manager _____

Haworth Order Numbers _____

Dates Installed _____

Was there a punch list of products or services used to complete this project? Yes No

Is this the second Sign-Off Agreement for this project? Yes No

I, the undersigned, representing _____ (customer) hereby accept the installation of the Haworth products as complete and meeting the specified project requirements. Based upon this acceptance, payment for products and services will be processed within payment terms.

Before making any changes, (either installation or add-on/replacement orders), please contact either of the contacts listed below.

Selling Dealer Information

Selling Dealer _____ Dealer Coordinator _____

Phone # _____ Email Address _____

Customer Information

Accepted By _____ Date _____

Title _____

Installing Dealer Information

Installing Dealer Coordinator _____ Date _____

Phone # _____ Email Address _____

Installing Dealer, please return completed form with invoice to dealerlink@haworth.com.