Customer Onboarding Office List

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| # | x | Task |
| 1. |  | New Lead comes in and an appointment is set to do an onsite walk. |
| 2. |  | Representative goes out to walk the property to give quote. |
| 3. |  | Representative sends quote same day. |
| 4. |  | After proposal is sent crm janibid will auto-follow up. Or the representative can manually follow up. |
| 5. |  | Send Customer a how did our representative do survey. |
| 6. |  | When customer notifies us they are ready to move forward. Send them an email with next steps. |
| 7. |  | We gather the details and send an agreement for e-signature. |
| 8. |  | E-signature software will follow up with the customer until customer fills out enrollment package. |
| 9. |  | When contract is received. Submit customer enrollment and in-house forms to office manager. |
| 10 |  | Scheduling will schedule a cleaner for requested start date. |
| 11. |  | Scheduling will send in house forms to manager and accounting |
| 12. |  | Representative will reach out to customer 1-3 days prior to start date to schedule a pre-service walk through with the customer and the employee manager to go over a new account checklist. |
| 13. |  | New Account Walk through takes place and the crm janibid is updated with information. |
| 14. |  | First scheduled cleaning with account |
| 15. |  | Next day follow up with email or crm janibid will automatically send this. |
| 16. |  | 3 day after first cleaning send a how did we do leave us a review email- or crm janibid can automate this email. |
| 17. |  | Accounting will send a welcome email to their accounting department. |
| 18. |  | 7 days after service send a referral email or crm janibid can automate this for you. |
| 19. |  | Every 1st of the month send a monthly discount/special email as a customer of ours. |
| 20. |  | Representative will do an inperson check in on service every 6-7 weeks. |
| 21. |  | Every 60 days the crm janibid will automate a checking in email to keep contact with our customers. |
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