

Customer Onboarding Office List

Customer: _____

Date: _____

#	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 1 st 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.