

Pre-Sale

1. Call & Email | Director

Schedule a walk-through meeting. Share the importance of conducting a walk-through and what we'll accomplish. Inform who will do the walk-through. Email should CC and include the contact info of whoever does the walk-through.

2. Meet | Director

Walk-through pre-sale. (See guide - pg. 8)

Post-Sale

3. Email | Salesperson

Post signed contract.

"Thanks for signing up and be on the lookout for someone from Operations Team to reach out and discuss the next steps as we get ready to start."

4. Call | Director

After post-sale signing, immediately schedule a meeting to discuss all client expectations going forward.

5. Meet | Director

Schedule a Post-sale "meeting expectations" discussion with the Area Manager (see guide - pg. 9).

6. Document | Director

Document all "meeting expectation" notes in Salesforce.

7. Email | Director

Email client one day before pre-scheduled "Orientation Day" activities. *Content of email: To ensure a very smooth take-off and seamless transition we need to do this... (CC Account Manager).*

Go-Live

8. Meet | Account Manager

Orientation Day (see guide – pg. 10)

9. Text | Director

Text the client on day 1 of the job. “Today was our first day. We’re on-site observing and taking care. If there’s any reason for you to reach out, please don’t hesitate. We’re here for you.”

10. Call & Email | Account Manager

Call the client 4-6 days after the service start date. Ask for feedback about the client’s the first few days of onboarding. Follow up with an email recap to client.

11. Email/Call | Account Manager

In a month (after billing) check in with OPS for an update. Then contact the client about their experience. Offer to assist in any way possible, as needed. (Our goal at this stage is to exceed the client’s expectation and get a good review).

12. Site Visits | Phase 1: Area Manager

During the first 2 weeks area manager should visit 2 x per week, weeks 3-8 visit once per week. (See guide pages 12/13)

13. Site Visits | Phase 2: Director

During the first 2 weeks Director should visit 1 x per week, weeks 3-8 visit once every 2 weeks. (See guide pages 12/13)

Lifetime

14. Site Visits | Area Manager

The Area Manager should visit all sites a minimum of every 2.5 weeks. (See guide – pg. 12)

15. Site Visits | Director

The Director should visit all sites a minimum of every 3 months. (See guide – pg. 13)

16. Surveys | Account Manager

Conduct Surveys (see guide – pg. 14)