SMRT

PROJECT MANAGERS GUIDELINES

1- INTRO CALL.

Call initiated by the sales rep with the business owner to introduce yourself and explain to the customer what to expect in the next weeks.

- Questionnaires: explain there are 3 forms to be submitted. Business Questionnaire is to be filled out with you, Files and Training forms will be emailed after BQ call and they will have 2-3 days to submit back. <u>Make sure you set a day/time for the BQ on this call!</u>
- Training: once all forms have been received, you will provide a training/implementation calendar within 3 days.
- Live Date: make sure the customer understands the importance of reviewing the training calendar with his team as that is the only chance they have to request changes to the going live date. <u>Once they approve the dates, they are committing to the day SMRT will start charging them-- pushing the date after agreeing to it will be subject to the PM's availability (not necessarily the day they are asking for) AND they will still be charged on the original agreed upon date.</u>

2- BQ CALL.

- Go over the whole BQ, regardless of what type of business they have (small/easy, or big/complex). You can skip the Q's that are not applicable but it's very important to complete this questionnaire so that YOU understand how their instance will be customized and how data transfers will be handled.
- Within an hour after finishing the BQ, email the customer the next 2 forms (files and training) with clear instructions about the deadline.

3- TRAINING & IMPLEMENTATION STRATEGY.

- Review each submitted questionnaire to start setting up the instance while also taking notes for your data manager-- what or how should or not be imported.
- Within 3 days of receiving all the questionnaires, create and send the customer a calendar detailing your training and implementation strategy. This calendar should account for:
  - first data pull
  - admins, route and csr's training
  - practice
  - follow up q's
  - inventory in their current system
  - last data pull
  - live date

  Remind your customer that it is VERY important they review this calendar with their team before they approve it. <u>Once they approve the dates, they are committing to the day SMRT will start charging them-- pushing the date after agreeing to it will be subject to the PM's availability (not necessarily the day they are asking for) AND they will still be charged on the original agreed upon date.</u>

4- GOING LIVE.

- You will be remotely monitoring every station on the first day.
- You will be 100% available over phone, text, or email from the 2nd to 7th day of them going live.
- By the 8th-10th day you should be handing your instance to support. Scheduled a call with your customer where you can introduce Nick to them.

5- REVIEWS.

- A week after support hand-off, reach back to the customer to assess what their experience has been. If positive, request reviews from as many staff members as possible, provide them the link to post their review and follow up 3 days after IF they haven't confirmed they have posted it.