The Client Journey

Legend

Start/Stop

Input

Detailed Process

Document

Decision

Office

Service Tech

Service Manager

Group Meeting

Inter-department

Cross-department

Software

Design/Engineering

Accounting

CRM

Inventory

Contract

Communication

Drawings

Project Site

Time Tracking/Scheduling

Design

Document Storage

Design

SOP's & Checklists

Office
- Initial Client Set-up
- Order Products

Warehouse
- Receive Products
- Return Unused Products

Ops

Sales
- Capture Lead in monday.com
- Qualify Lead/Assign Sales Lead
- Post Call Follow-up
- Create Potential Client Folder
- Initial Client Meeting & Experience Demo
- Review Required?
- Create Initial Design Docs
- Project Hand-off
- Develop Design Package - Fast Track
- Project Debrief
- Client Follow-up

Designer
- Develop Design Package - 4 Phase Project
- Finalize Project Docs

PM
- Site Audit - Pre-wire
- Electrical Walk-thru
- Pre-Drywall Meeting
- Pre-Drywall Audit
- Post Drywall Walk
- Site Audit - Post Drywall
- Project Update - All Phases
- Site Audit - Trim
- UX Meeting
- Execute Equipment Delivery
- Substantial Completion
- Manage Return of Unused Products
- Client Training
- Service Turnover

Field Techs
- Execute Rough-in
- Execute Punch List - Post Electrical Walk-thru
- Trim Equipment Prep
- Execute Trim
- Develop Initial Program
- Build Racks
- Test Racks
- Rack QC
- Execute Final Install
- Final QC

Service
- Troubleshoot Onsite/Install Product
- New Solution
- Create Proposal/Order Parts
- Create RMA

ONE-TOUCH
Automation