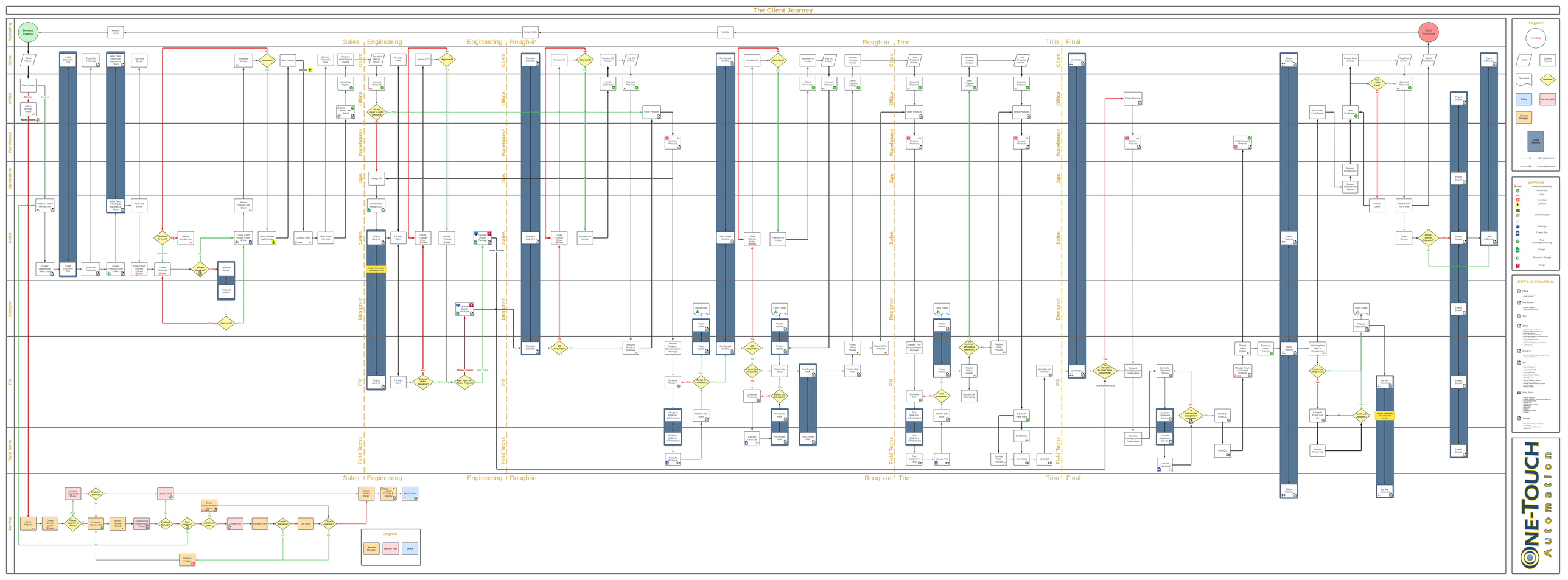
The Client Journey
Marketing
Client
Office
Warehouse
Operations
Sales
Designer
PM
Field Techs
Service
Sales
Engineering
Engineering
Rough-in
Rough-in
Trim
Trim
Final
Demand Creation
Word of Mouth
Social Media
Website
Client Testimonial
Client Inquiry
Service
Product
Add to Monday Board
Notification In
Initial Discovery Call
Post Call Follow-up
Initial Client Meeting & Experience Demo
Post Visit E-mail
Capture Lead in Monday.com
Qualify Customer - Sales Lead
Initial Discovery Call
Post Call Follow-up
Initial Client Meeting & Experience Demo
Post Visit E-mail
Enter Client Info in Quo & Tools
Create Proposal in Quo
Review Proposal
Proposal Review
Approved?
Update Monday
Revisions
Proposal Review
Proposal Review with Client
Create Client Google Folder & Site
Send Contract via DocuSign
Contract Won?
Sign. ok
Sign Contract
Send Thank You Note
Approved?
Receive Proposal in Quo
Receive Initial Deposit in Quo
Send Initial Deposit
Add Client to Quo Set-up
Payment Received
Pay Initial Deposit Invoice
PM Intro Client
Assign PM
Create Initial Design Docs
Project Handoff
Project Ownership Transitions to PM
PM Intro Client
Project Manager
Review CO
Approved?
Receive CO Invoice
Pay CO Invoice
Create Change Order Folder
Change Order Required?
PM Intro Client
Send CO Invoice
Payment Received
Request CO Invoice
Order Products
Receive Products
Electrical Walk-thru
Pre-Drywall Meeting
Create Change Order Folder
Request CO Invoice
Receive CO
Approved?
Receive CO Invoice
Pay CO Invoice
Send CO Invoice
Payment Received
Request CO Invoice
Order Products
Receive Products
Receive Progress Invoice
Pay Progress Invoice
Send Progress Invoice
Payment Received
Order Products
Receive Products
Receive Progress Invoice
Pay Progress Invoice
Send Progress Invoice
Payment Received
Order Products
Receive Products
Client Meeting
Final Walk
Client Meeting
Return Unused Products
Review Final Invoice
Pay Final Invoice
Payment Received
Submit Testimonial
Client Follow-up
Run Project Profit Report
Send Final Invoice
Request Final Invoice
Review Project Profit Report
Contact Client
Send Thank You E-mail
Project Review
Project Gallery Required?
Project Gallery
Project Gallery
Project Gallery