**Hi, Greg and I have created a rough outline of our workflow that may help ya'll in developing this tool.**

**I’ve included if/then situations what step each will take you to. This is definitely a rough draft and we would love suggestions/input**

1.      Initial Contact

o   Where we collect contact information and service needs. This occurs during phone conversation and/or emails.

o   If this initial contact leads to the client wanting to schedule a look at, go to #2

o   If this initial contact leads to client wanting to schedule an actual service that doesn’t need a look at, go to #4B

o   If this initial contact leads to client wanting to schedule a look at, go to #4A

2.      Ready to be Scheduled (Look At)

o   Office has gathered the basic information for a new client and determined what services are needed.

o   The Office lets Greg know that there is a new client who needs a Look At and the next step is Greg needs to let office know when he is available for a Look At. This would show up somehow on the dashboard of this system

3.      Scheduled (Look At)

o   Greg lets the Office know what options there are for him to go on the Look At.

o   Office calls/emails and sets up the Look At

o   Office puts Look At on the Calendar and Greg now sees that Look At is scheduled

4.      **A.** Look At

o   Greg goes on the Look At where he will fill out one or more of the following forms

§  Inventory for auction

§  Inventory for move

o   If Greg has to create a proposal for the service, he will take the information he has gathered at the Look At back to the office – go to #5

o   If Greg can create the proposal at the Look At, he will make the offer and have client sign the contract – Go to #6

**B.** Gathering information for service when Look At is not necessary

o   This is when a client doesn’t need a Look At, but we have to collect the same information that would be collected at a Look At. After information is gathered by email or phone, go to #5

5.      Proposal for Service is created, go to #6

o   Contract for auction

o   Move services contract

6.      Proposal is presented to potential Client

o   Client Accepts proposal, go to #7

o   Client declines proposal and wants to discuss changes – go back to ??

o   Client declines proposal and that is the end, go to #12

7.      Ready to be Scheduled (Service – Pick Up, Move, Combination) – go to #8

o   Greg looks at calendar, availability of movers and trucks, etc. and gives options for service dates

o   This may be a simple one day service or a combination of multiple days.

8.      Scheduled Work Order (Service – Pick Up, Move, Combination)

o   If Auction Pick Up and it’s not being sold right away, it goes to storage - #9

o   If Auction Pick Up and being sold right away, go to #10

o   If it’s a move that is complete, go to #11

o   If it’s a move into OUR storage, go to #9

9.      Storage

o   When auction items come out of storage, auction date is set – go to #10

o   When Move items come out of storage, a new scheduled work order begins, #8

10.   Auction Date

o   Auction Date is set, Items come out of storage, client is notified

o   After auction date is complete, go to #11

11.   Closure (Follow up, Review, made inactive)