



Customer Onboarding

8 STEPS

from Discussion
to Production

1

Prior to
Contract Signing



TEAMS

- Sales Representative
- Customer



Equipment & Location Details



Gather a complete equipment and location inventory to create an accurate delivery and installation dates and costs.

GREEN OFFICE PARTNER



- DCA & XDA created
- Complete inventory per location and replacement
- Collect delivery and installation requirements
- Quote estimation

CUSTOMER

- Installing DCA & XDA
- Reconcile collected inventory and verify equipment locations.
- Delivery details such as available dates, equipment & power access, number of stairs, etc.



2

Contract Signed:
Week
0



TEAMS

- Sales Representative
- Customer

Contract Signing



A signed updated contract with service agreement, delivery & installation dates

GREEN OFFICE PARTNER



- Update contract, estimated delivery and installation dates to meet customer and Green Office Partner service expectations and agreements.
- Send finalized contract
- Send customer onboarding checklist

CUSTOMER

- Verify contract, delivery and installation details.
- Verify all tasks are complete to ensure success of delivery and installation.
- Sign agreement and send.



3

Contract Signed:
Week 1



TEAMS

- Project Managers
- Sales Representative
- Customer (as needed)
- Finance
- Sales Admin

Green Office Partner Service and Sales Huddle



Ensure that the Services sold and expectations are set around installation time frame, and delivery can be met.

GREEN OFFICE PARTNER



- Perform full analysis of equipment, solutions and customer environment
- Identify potential delivery and installation dates
- Verify equipment and solutions availability
- Verify successful DCA & XDA reporting

CUSTOMER

- Help Green Office Partner with any missing customer information as needed.



4

Contract Signed:
Week 1



TEAMS

- Sales Admin
- Finance
- Customer

Sales Admin Onboarding/ Product Purchasing



To gather any missing customer detail prior to delivery and installation.

GREEN OFFICE PARTNER



- Verify client onboarding detail and contacting customer as needed
- Purchase products

CUSTOMER

- Provide any additional details to Sales Administration when requested



5

Contract
Signed:
Week
2



TEAMS

- Sales Representative
- Sales Admin
- Customer Success Manager
- Project Manager
- Installer

Customer Onboarding



Customer onboarding is conducted with all parties involved to ensure the success of the installation and future relationships.

GREEN OFFICE PARTNER



- Confirm delivery and installation dates and requirements
- Introduce Customer Success Manager to customer
- Set expectations on supplies and service delivery.
- Collect all client specific technical information that is needed.
- Perform a site survey to ensure equipment installation is successful.

CUSTOMER

- Confirm delivery and installation dates of equipment and solutions.
- Inform any changes that have risen since contract signature.



6

Contract Signed:
Week
3&4



TEAMS

- Project Manager
- Rigger Company
- Customer

Equipment Delivery



To confirm delivery dates, locations and accessibility by all parties.

GREEN OFFICE PARTNER



- Confirm and finalize delivery dates, locations and accessibility by rigger and customer

CUSTOMER

- Confirm all locations will be accessible and have space to place new equipment and store old equipment until it can be removed.



7

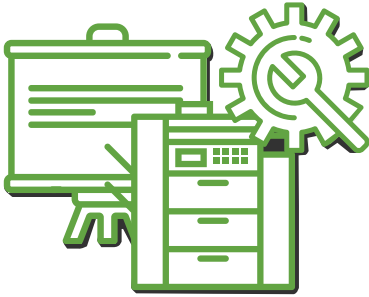
Contract
Signed:
Week
5



TEAMS

- Project Manager
- Installer
- Customer

Installation



Replace existing (old) with new equipment, move old equipment to a safe location and train staff how to use new equipment and access Helpdesk as needed.

GREEN OFFICE PARTNER



- Replace all existing equipment with new equipment
- Keep equipment environment clean and organized
- Handle existing toner as needed
- Train staff on how to and access Helpdesk
- Get completion of work signed

CUSTOMER

- Inform staff of installation and training dates
- Get environment prepared for installation
- Provide lease return information for old equipment where appreciable.
- Facilitate the return and removal of old equipment
- Sign completion of work when appropriate



8

Contract Signed:
Week
6&7



TEAMS

- Customer Success Manager
- Project Manager (as needed)
- Customer

Customer Follow up



To verify all customer's expectations have been met.

GREEN OFFICE PARTNER



- Do Installation Close out
- Send customer rating score card
- Open and handle any identified tasks
- Follow up with client in two weeks to insure equipment and service are meeting desired expectations.

CUSTOMER

- Gather any staff concerns and provide feedback to CSM to achieved expectation
- Complete customer rating score card

