

SOCIALCRM

On-Boarding Process

Day 1

Sale Finalized

Sales Consultant installs Extraction Utility and sends order to Mitchell 1 Order Processing

Sales Consultant collects custom logo and /or coupons and enters special instructions to send in with order

- if NO then QUICK START process
- if YES then REGULAR START process

Welcome Kit is mailed to customer

Order is sent from Order Processing to On Boarding Agent

QUICK START

3-5 Business Days

Who: On Boarding Agent:

- What:
1. Verifies extraction
 2. Shop registration
 3. Set default logo
 4. No outbound call to shop

5th Business Day

Who: On Boarding Agent:

- What:
1. Send out Welcome email
 2. Service starts next business day
 3. On Boarding Agent Assigns the Account to a Support Agent

3-5 Business Days

Who: Support Agent

- What:
1. Shop introduction call

Time Line: 10-12 Business Days

(depending on customer availability)

REGULAR START

3-5 Business Days

Who: On Boarding Agent:

- What:
1. Call shop to set up account (*could take several calls depending on customer availability*)
 2. Verify logo is setup in shop registration
 3. Check extraction utility
 4. Gather any additional marketing materials

5th Business Day

Who: On Boarding Agent:

- What:
1. Send out Welcome email
 2. Service starts next business day
 3. On Boarding Agent Assigns the Account to a Support Agent

3-5 Business Days

Who: Support Agent

- What:
1. Shop introduction call

Time Line: 13-15 Business Days

(depending on customer availability)

**Any questions please contact the SocialCRM Support Team:
800.410.0529 | crmsupport@mitchell1.com**

