RETAINER SERVICE ONBOARDING ROUTING FORM

Customer Name

Sale Date:

Business Name

Service

Total Sale Amount $

SALES CONSULTANT: ______________________

	INITIAL	DATE
1 Get the agreement signed		
2 Collect payment		
3 Go to the Request Line and fill out an Onboarding Alert Form		
4 Enter the Sale in the AGM Master Sales spreadsheet		
5 Create a physical file and label it with the company name		
6 Print and file agreement in the Phisical File		
7 Enter customer information in HighLevel Including Email, Phone number, Business Name, Website (search for the client first before you create a new contact)		
8 Tag the client as "agm active clients" and tag the service type like: "Branding", "Lead Gen", Ecomm, "Email Marketing", Etc.		
9 Switch the contact type from "lead" to "Customer"		
10 Add the Service information to the Notes including what they paid for, how much, and what are the deliverables.		
11 Upload agreement to ClickUp		
12 Hands over this form to the Production Manager		

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PRODUCTION MANAGER	INITIAL	DATE
13 Verify all data in fthe physical folder and in ClickUp		
14 Create Project and 13 main tasks on TimeDoctor		
15 Create an Egnyte folder and add a link to CRM client details		
16 Add to stat group in the CRM		

FINANCE STAFF

17 Create Quickbooks invoice		
18 File paid invoice in folder		
19 Add to the Recurring Income tab in the Financial Google sheet		
20 Add to current Month' in the Financial Google sheet and income Tab		
21 Add the finance data as a comment in the Google sheet		
22 Email the Retention Specialist to continue with this checklist		

Marketing Department (Retention Specialist)

26 Ensure the customer is in the HighLevel		
27 Coordinate with CMO to send a welcome email		
28 Activate New Client task list in CRM		

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29 Assign the account to an Account Manager ____________ ____________

30 Add account information to Health Chart ____________ ____________

31 Ensure Account Manager has read the agreement ____________ ____________

32 Ensure Media Buyer has read the agreement ____________ ____________

DIV 4 (Amazon)

33 Activate the Task List in the CRM under the Client ____________ ____________

NOTE: You need to continue with the tasks list in the CRM until completion. When you have completed that task list, also print it out and take it to the Ollie's comm box and include the customer's name.

I confirm that the above tasks have been fully completed and the customer has successfully been onboarding and is now rolling.

Signature Date

Approved by Production Manager Signature Date