Attention Grabbing Media

NEW SALE ONBOARDING ROUTING FORM

The purpose of this onboarding checklist for new and exisiting clients is to ensure a structured and efficient process for onboarding clients onto our products or services here at AGM.

CUSTOMER NAME: ______________________________ DATE: ____________

BUSINESS NAME: ______________________________

SALES CONSULTANT: ______________________ RETAINER VALUE: ____________

☐ PAID ADS ☐ BRANDING ☐ AMAZON ☐ OTHER

SALES REP	INITIAL	DATE
☐ Fill out the onboarding alert form via the request line	______	______
☐ Enter your sales on ClickUp under sales	______	______
☐ Hand this routing form to the Admin Officer	______	______
ADMINISTRATION OFFICER		
☐ Verify digital card shows up in the retainer list	______	______
☐ Create a Time Doctor project	______	______
☐ Hand this routing form to the Accounting Officer	______	______
☐ Ensure the welcome call was done	______	______
ACCOUNTING OFFICER		
☐ Create QB invoice if necessary	______	______
☐ Verify payment was recieved	______	______
☐ Create digital card on ClickUp to invoice list	______	______
☐ Hand this routing form to the CMO	______	______
CMO / PRODUCTION MANAGER		
☐ Review agreements inside the client card	______	______
☐ Send wecome email	______	______
☐ Assign account manager	______	______
☐ Add customer email to your survey list	______	______
ACCOUNT MANAGER		
☐ Read customer agreement	______	______
☐ Read sales rep phone notes	______	______
☐ Send intro email to schedule onboarding call	______	______
☐ Activate the onboarding checklist	______	______
☐ Create graphs for KPI's in the CRM	______	______
☐ Route this form to the operations officer	______	______
CHIEF OPERATIONS OFFICER		
☐ Review the above was done correctly	______	______
☐ File form	______	______