Beginning of Day Checklist:

- [ ] 1) Check CRM before entering house for any applicable client photos or notes
- [ ] 2) Arrival on time and dressed in Clutterless Gear, Ring doorbell unless you see a note saying otherwise.
- [ ] 3) Greet client/introduce yourself to the client & do walk around to make sure you understand the clients ultimate goal for the space
- [ ] 4) Take before PHOTOS & Take before VIDEOS
- [ ] 5) Upload the photos and introduce the project on Instagram story (edit dark photos if necessary!)
- [ ] 6) Upload an Instagram story swipe up template and link it to https://www.clutterlesshomesolutions.com/workwithus

Middle of Day Checklist:

- [ ] 7) Update the Instagram Story with progress pictures, post photos of products purchased after shopping trip
- [ ] 8) Create 1 TikTok Video Inspired by Discover (Trending) and POST ON TIKTOK with a description and hashtags

End of Day Checklist:

WITH CLIENT IN THEIR HOME:

- [ ] 9) Take after PHOTOS & VIDEOS of project
- [ ] 10) Give client their walkthrough of project
- [ ] 11) Calculate the end of day total separating labor cost from supplies cost (apply/ don't apply deposit)
- [ ] 12) Give the client their thank you note & THANK THEM!
- [ ] 13) Get GOOGLE REVIEW from client BEFORE YOU LEAVE

IN YOUR CAR BEFORE DRIVING HOME:

- [ ] 14) Upload the after PHOTOS and VIDEOS to the Instagram story (edit dark photos if necessary!)
- [ ] 15) Upload an instagram story swipe up template and link it to https://www.clutterlesshomesolutions.com/workwithus
- [ ] 16) Make invoice for client using Invoice from Clutterless Media Google Drive.
- [ ] 17) Upload the before and after PHOTOS & VIDEOS to the clients name on the CRM
- [ ] 18) Update CRM with all applicable client notes (more projects, when they want followup, etc)
- [ ] 19) Upload receipts for supplies to the client's profile

Checklist Key:

1) This will have all photos client sent in to be assessed for an estimate. It will also have the clients phone number, email, address and any notes about what the client wants to accomplish for the project (i.e. biggest pain points, what they want to accomplish, if this is several day project, special things to note, etc.)
2) Uniform is Clutterless T-Shirt or Clutterless Zip Up with leggings only. We no longer allow shorts or sweatpants inside clients homes or on site - the only exception is on cold days IN garages you may wear sweatpants or ski pants. Send a text if you don't get a response the first time. Don't ring twice until after 5 minutes and a text as been sent.
3) CRM will have these notes but it's good to talk about them in person since they've only talked directly to Lahni/receptionist
4) Make sure to take a unique photo to upload to our Instagram Stories as the intro (i.e. Pic of client unique front door, pic of mountains, pic of something cool on way to work, cute art int the clients space, etc) Take pan-over video for before look, and Tik Tok or instagram reel related please so make sure to think of ideas you'd like to do! Be Creative!!
5) Example= Type of Project, Location, Goals for Project | i.e. Garage Project - Englewood, CO - Goals are to Make garage look nice, find things easily, fit two cars in…) We want everyone to have the login and be able to do this because it's important to us as a brand and we want everyone as a team to be on our Instagram because we are a team based company!
6)Templates are on ClutterlessMedia Google Drive under instagram story swipe up templates- choose any template you would like
7)Show everything our team picked up for the job, Explain products and why you use them!
8)Go to discover on TikTok and find a trending type of video to use (Before & After, Gotta Put Me First, etc.) Create a quick video usually 15-30 seconds and post to tik tok! NOTE: MAKE SURE TO ADD HASHTAGS AND A DESCRIPTION.
9) Make sure to look at the before photos and videos before you take these. You want them to be the exact same angle as the before — this looks way more professional. For after videos make sure to do the pan-over after same as the before and an after video of the reel/TIK TOK idea you did!
10) Make sure to note anything that was moved from where it was originally and go through every drawer and cabinet/shelf/area so they know where their things are!
11) Do this in your notes so you can easily write things down. Make sure to write down how many hours on site you worked, any other organizers worked, total for that (hours x $110 unless trainees or otherwise noted), write in supply cost, apply deposit if we aren't going back. (ASK), and have total ready. This will help with you entering it into the Invoice to send to the client later!
12) I have them with me and will be getting them to you! Please keep a small Kleenex box or something in your car so you can keep these from getting bent or dirty. Each organizer should sign it at the end of the day and take the time to explain to the client the "Target gift card" on the back. All you have to say is: "we want to make sure you saw this Target gift card on the back here and explain what it means. Basically, if you recommend us to friends, family or anyone!, we will give you a $50 gift card to target for each person you refer after they book with us!"

13) It's really important that we have you guys getting reviews on site. It's much easier to get them to do it. Try saying " the link doesn't always work can you try it now so we make sure it works?" NOTE: DO NOT do this if the client is pissed off. We don't want to make it easy for them to give us a bad review. The resources note shared with everyone has this link.
14) Follow the format from past stories. We typically select all the before photos as the pics, then when you go in and edit them you can click the smiley face scroll down to the images icon, click that and choose the corresponding after photo. You will have to resize them and click on the after photo until the shape matches the before image. Add in the before and after captions and if you changed something drastic, add in a caption about what you did and why. If you implemented a new organizing supply, make a caption about why we used it.
15) Templates are on Chsmedia google drive under Instagram Story swipe files- choose any template you would like) — these get people to book with us so don't forget it!!
16) How To Video is uploaded to Clutterless Media Drive. Here are the steps if you go to Clutterless Media Google Drive: Open up Google Drive, click on Client Invoice Template, click on Clutterless Home Solutions Invoice (there is another one as an example so look over that to see how to fill it out!), fill it out with the client's info (how many organizers on site, where you went shopping, the total for the labor, total for supplies, the deposit and whether it's been applied, the date, the total and write a little personalized note at the end - one or two sentences!)
17) How To Video is uploaded to Clutterless Media Drive. Click into the CRM (CJournal) app. Search client's name, click on their name, click files, click the plus sign, click import from photos, select all before and after photos and videos, click plus, click iCloud Drive, click the invoice you created for the client
18) What major things did we do for the project, how much did the client pay & how did they pay (breakdown between labor & supplies), note about how end of day went (was client happy, mad, sad, etc.) if client wants to get a future project done, name of dog -black lab hank or moment shared detox face mask with client (NOTE: make sure to add a reminder for receptionist to follow up with this client - I.e. If client wants us to follow up in 2 months add reminder for receptionist to follow up in 60 days)
19) Do this AFTER you've done all returns. Please take a picture with the original receipt(s) and return receipt(s) and take separate pictures of the different stores. (i.e. Target original receipt with return receipt in one pic, Home Depot original receipt with return receipt in another pic)