

CF: Schedule Client Review Meeting

1 Confirm schedule preferences and important pending topics in OneNote to use to motivate client to schedule in customized email

Priority: None

Due: 1 day later, at 10:00am

Assigned to: Cooper Shubert

2 Send schedule email (ATTACH EMAIL) with some customization for Tier 1 clients

Priority: None

Due: 1 day later, at 10:00am

Assigned to: Cooper Shubert

3 Waiting for client to schedule review meeting

Priority: None

Due: 7 days later, at 10:00am

Assigned to: Cooper Shubert

3 Outcomes

No Response to Schedule Email 1

Go to Step: Call primary client to see if they want to meet during period (ADD SCRIPT)

Review Meeting Scheduled

Go to Step: Confirm meeting scheduled via Calendly and confirmation emails and texts are set to send

No Response to Schedule Call or Email

Go to Step: Bring Tanya details about why we should be meeting this cycle, or if they haven't responded - should we continue to pursue or wait till the next cycle.

4 Call primary client to see if they want to meet during period (ADD SCRIPT)

Priority: None

Due: 7 days later, at 10:00am

Assigned to: Cooper Shubert

2 Outcomes

Left message to schedule meeting

Go to Step: Waiting for client to schedule review meeting

Client Scheduled Meeting

Go to Step: Confirm meeting scheduled via Calendly and confirmation emails and texts are set to send

5 Confirm meeting scheduled via Calendly and confirmation emails and texts are set to send

Priority: None

Due: 1 day later, at 10:00am

Assigned to: Cooper Shubert

6 Schedule Client Review Prep workflow for 2 weeks before meeting ?

Priority: None

Due: same day, at 10:00am

Assigned to: Cooper Shubert

7 Schedule Post Review Follow Up Workflow for the day the meeting was scheduled

Priority: None

Due: same day, at 10:00am

Assigned to: Cooper Shubert

8 Bring Tanya details about why we should be meeting this cycle, or if they haven't responded - should we continue to pursue or wait till the next cycle.

Priority: None

Due: 7 days later, at 10:30am

Assigned to: Cooper Shubert