

# Client Onboarding Process

## 01 Initial Contact

- When a customer reaches out to us for cleaning services, we promptly respond and gather their requirements.



## 02 Site Visit and Estimate

- We schedule a convenient time to visit the client's location and discuss their cleaning needs in detail.
- Based on the site visit, we prepare a customized estimate and promptly email it to the client.



## 03 Estimate Follow-Up

- We proactively follow up with the client to ensure they received the estimate and address any questions or concerns they may have.



## 05 Contract Signing

- To streamline the process, we utilize DocuSign for secure and efficient contract signing.
- The client can conveniently review and electronically sign the contract from their preferred device.



## 04 Contract Preparation

- Once the client agrees to proceed, we prepare a contract outlining the agreed-upon terms and services.
- We maintain open communication during this process, collaborating with the client to finalize the contract details.



## 06 Scheduling the First Visit

- We schedule the initial cleaning visit, which typically involves a comprehensive and thorough cleaning to set a high standard.
- This deep cleaning ensures a fresh start for the recurring cleaning schedule.



## 07 Invoicing and Recurring Schedule Setup

- Following the initial cleaning, we promptly invoice the client for the service provided.
- Together, we establish a recurring cleaning schedule based on the client's preferences and needs.



## 08 Timely Billing

- We have a consistent billing process, with invoices typically issued on the 20th of each month.
- This ensures clear communication and enables efficient payment processing.



By following this streamlined process, we aim to provide exceptional service and establish a long-lasting partnership with our valued recurring clients.

