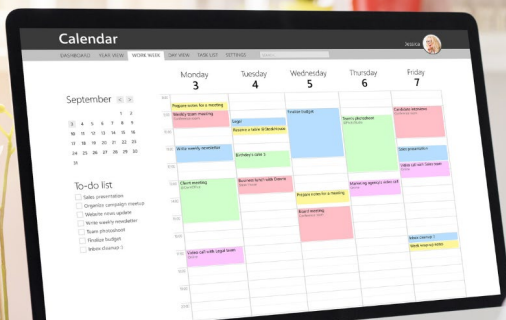




# BOOKING A NEW

# APPOINTMENT

## CHECKLIST

**Pay close attention to your business and personal calendar to book the clients correctly, Your client's availability and your availability should match.**

**Book an appointment with a client using an online scheduling system, or Excel sheet (Client's profile)**

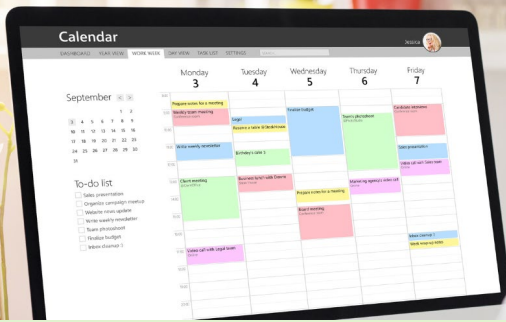
### COLLECT THE BASIC INFORMATION:

- ✓ **First name/last name of the person you are talking to.** If they want to book an appointment for someone else- then note the **name of the person for whom the appointment is.**
- ✓ **Home address** where the appointment will take place.
- ✓ **Email**
- ✓ **Phone number**

### ADDITIONAL QUESTIONS:

- **How will the cleaner get inside?** (they will let the cleaner in/ they will leave the key/ they will provide the garage /front door code)
- **Parking rules** (driveway, on the side) !
- **If there is a promo currently running, then, inform your client and offer to apply the coupon.**
- **Thank a client for scheduling an appointment.**

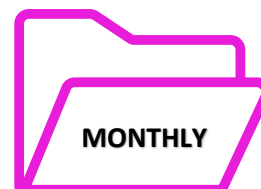




## RECORD A CLIENT'S INFORMATION IN YOUR GOOGLE DRIVE FILES.

- **ONCE THE APPOINTMENT IS BOOKED, YOU MUST PUT ALL THE CLIENT'S INFORMATION INTO THE COMPANY'S SYSTEM FILES. TO DO THAT, YOU NEED TO CREATE A NEW FOLDER WITH A CLIENT'S NAME IN THE CLIENTS' ACCOUNTS FOLDER ON GOOGLE DRIVE. ALL NEW CLIENTS ARE CONSIDERED TO BE ONE-TIME CLIENTS AND SHOULD HAVE A **YELLOW CODING LABEL** ASSIGNED TO THEIR FOLDERS, UNTIL THEY'LL BECOME RECURRING CLIENTS.**

**USE ASSIGNED FOLDER COLOR FOR OTHER TYPES OF CLIENTS:**



- **After the folder is created, the next step is to create Google Notes Document to track client's appointment history.**
- **Email a client his/her **WELCOME PACKET +INVOICE** combo.**