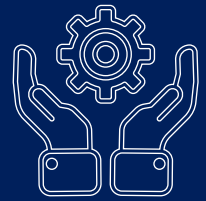# Order Work Flow

## Presales

- Mike/Pete/Amy supports agent to answer questions. A discovery meeting/call with potential client and operations manager can be set if they have 20+ seats.
- Agent requests bills (phone, cable, etc.).
- Quote request is submitted via the online web form - customer email must be correct. Mike/Pete prepare Simplicity quote for agent. Pete/agent/CS prepares other provider quotes for auxiliary services needed.
- Quote(s) is sent to agent. Agent presents option to customer for approval.
- Agent notifies Mike/Pete which quote to convert to an order with a completed workbook.
- Order is sent electronically to customer for electronic signature as well as link to process credit card payment.

## Provisioning

- Client Services contacts client to schedule Welcome call within 1 - 2 business days of receiving signed order and completed workbook - inviting client contact, client IT contact, Simplicity technician, Client Services and agent to participate in the call.
- Welcome Call:
  - All items on the order and Workbook are reconfirmed. (e.g. confirm number to be ported, extension list, auto-attendant set-up - offer professional audio recording, Caller ID, call routing, 911, etc.) are reconfirmed.
  - Client Services schedules site survey with client.
  - Client Services sets tentative install date.
  - Client Services requests bill copies.
- Client Services will produce the LOA and send to customer for review and execution.
- Technician conducts site survey and makes necessary changes to the order (e.g. number of phones, upgrades of phones).
- Client Services sends port requests to LNP department.
- Equipment is ordered.
- Once FOC is received, Client Services sends installation invitation to client, their IT contact Simplicity Technician. User Guides (portal and phone) are attached to the invitation for client use.
- Upon the equipment's arrival, Client Services configures phones, labels and prepares for Simplicity technician to deploy.
- Client Services builds the client account in the portal (include extensions, auto-attendant, call groups, etc.).
- On Day of Install:
  - Technician arrives on site 2 hours prior to porting.
  - Technician installs router and switch. If installing a Peplink router, technician will add serial numbers into InControl (Simplicity managed service monitoring).
  - Technician unboxes and places phones on desks.
  - Once confirmation that the port has taken place, the technician/trainer will train the onsite contact how to use the phone and set up auto attendants, voicemails, mobile app, etc.
  - Once all phones are active, the technician/trainer will do group training on how to use the phone, mobile app, etc. as needed.

## Post Sales

- The same day of/next day after install, Client Services sends completion letter, copying agent and marketing.
- Agent contacts client the day after to touch base on their experience.
- Marketing department sends out a "follow-up survey" within 2 business days of the install.
- Customer email gets added to outage list.
- Marketing facilitates personal note from president to new client.

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