



CUSTOMER ONBOARDING PROCESS: POST INSTALL

IMAGING

- Physical thank you letter, physical welcome kits, and electronic welcome kit selections have been removed from the CIS form
- Thank you letters have been replaced with a video from Chris Taylor in the electronic welcome email attached
- Electronic welcome emails are scheduled to out 24 hours after and install call is closed in E-Auto
 - This email goes to the email address listed under "caller contact" in E-Auto
 - Example email link:
<https://campaignlp.constantcontact.com/em/1129376209602/cf2ed48d-f344-4d6e-aaa7-bac40de1c39a>
- Physical welcome kits need to be pulled together by reps with the Fisher's merch at your location
 - Please work with your regional manager if you need more supplies
 - Boise office: email info@fisherstech.com to have a welcome kit made

Physical Welcome Kits

HQ: AM's reach out to info@fisherstech.com to get a physical WK

Markets: Create their own welcome kits (if inventory/swag is needed, email info@fisherstech.com)

Presentation

Items you will need:

- Fisher's Gray Bag
- Fisher's Folder
- Account Manager's Business Card
- General Flyer
 - Print on 80 lb, glossy
- Quick Reference Guide (aka Cheat Sheet)
 - Print on 80 lb, cover
- Fisher's Mints
- Fisher's Notepad & Pen
 - NOTE: If your market is ever out of these items. Send an email to info@fisherstech.com and we will make sure to replenish your inventory.

AM's are responsible for delivering their welcome kits to the customer in a timely manner.



UNIFIED INFORMATION TECHNOLOGY

WAITING ON FEEDBACK FROM IT

DOCUMENT AUTOMATION

NO PROCESS IN PLACE