Typical Onboarding Timeline

08/08/2024 4:04 pm CDT

Overview

This is a general timeline of onboarding a new brand within service**minder.** These are the steps of the process that your brand most likely went through when they first joined service**minder.** Most likely, a brand will not need to go through this intensive onboarding regime, but here is a refresher on how we set up brands for success.

You may also want to review our training curriculum if you are bringing new franchisees onboard and you want to refresh your SOPs.

Trial Account

After product demos, your brand would have set up a Trial Account. These are complimentary, meaning that you do not pay for this account. It would have become your Brand Account when onboarding. A brand account is used as the parent account and organizations fall underneath it.

- **Organizations(Orgs)**- this is our term for locations or branches; they have an owner, which is the franchisee.

> Some brands choose to have multiple Brand Accounts but any additional accounts beyond your first complementary account may require an additional payment.

All initial users and all brand staff will be created in this account. The training will cover how to add new users but if you want to provide us with an initial list of brand admin staff, we can get those set up for you during initial onboarding.

> Note that when we add new users, we will send an initial email to them so they can configure their passwords, so always make sure the email address exists prior to adding them in service**minder**.

This initial account will also be the home base for your brand's default configuration including, services, parts, pricing, templates, etc. When you're ready to set up new locations or update your location's configuration, the **Deploy** tool can be used to "one-click" push these changes to all (or select) locations.

Configuration

There will be a series of calls between the brand and the onboarding group at service**minder**. The goal of these calls is to learn as much bout your business as we can and make sure we set up your franchise for success. This process may last 2 - 4 weeks.

We will want to know things like:

- Is your business based on recurring appointments or are you project-based? Are you a mix of both? How do you organize techs in the field? Are you based on teams, solo agents, or do you utilize contractors?

- What are your royalties based on? What additional fees to you charge franchisees? How do you want your billing set up for your service**minder** accounts?

- We will want to understand how your owners run their business so we can help instruct how they should use service**minder** to manage their business efficiently. Please share with us the details of how your owners create estimates, if deposits are required, do they have follow up inspections, or do they invoice before the appointment is scheduled?

- We will also ask what integrations you are using and how to pull in data through APIs. Do you use a call center? Will they need training on service**minder**?

In-App Logo

This is the logo that is shown in the upper left corner when users log in. This will default to the service**minder**.io logo until yours is configured. The specs are:

transparent background PNG format, 50 pixels high, up to 200 pixels wide. This is always presented on our dark blue background so light colors will stand out better. This logo is never customer facing, only toward users.

Content Logo

This is the logo that defaults into email templates, proposals, invoices and other client facing views. This logo should be designed for a white background and should match your brand standard colors. The size is typically 500px square and we will scale as needed.

It typically takes a couple of days for changes to the logos to reflect in production as these are deployed as part of our application deploy process.

Data Loading

This is typically the most time consuming activity with onboarding, depending on how much existing data you have to load in. This can be between 2 - 4 months.

We support loading the following typical elements (not exhaustive)
- Customers/Prospects (Contacts)
- Appointments (past and future)
- Invoices (and payments)
- Proposals (past and open)

Our import process involves three phases:

1) Translation

The translation phase involves taking all of your available files (in CSV format) and then combining them into a single file that service**minder**.io understands how to import. When importing, we'll automatically create entries for things that don't exist such as parts, services, channels, campaigns, tags, etc.

This task involves us understanding and mapping all of your data, including identifying critical data as well as data that can be ignored. We'll have lots of questions during this process. Once we've mapped all of the data that we think is needed, we'll do a trial import.

2) Importing

During the import process, we will use any existing configuration (already set up or auto-created as part of the import process). We will also tag all contacts that are imported as part of this particular import. Once complete, we will do an initial review and then invite you to start reviewing and validating the data as well. We then use the feedback from these reviews to tweak the translation process, delete the data that was imported and run it again. This is very much a rinse-and-repeat process.

We will start with a single location to develop our understanding of the data and how it maps to service**minder**. Once this all lines up and passes validation, we'll then do trial loads for the remaining locations. At this point, owners can be set up to allow them to start reviewing data as well.

Depending on your transition strategy, we can do this process incrementally, over time, or we can work to schedule a bulk migration (over a weekend or two depending on the amount of data).

3) Validation

This step is important for helping to ensure accuracy of the imported data. Since we won't have direct access into your previous system, there isn't a great way for us to compare the data we imported with how it looks in the old system. We typically recommend for you to try and run some basic comparisons between service**minder** and your old system. Here's some things you can check:

- Check contact counts to make sure there aren't drastic differences. Some small differences can be normal if for example two contacts share the same name, address, etc. Sometimes those can get merged together during import.

- Pick a few large customers and compare directly with the old system. Make sure their basic information looks good, and that they have the same number of invoices and appointments, if that applies. You'll also want to check things like the totals of the invoices, what line items they have, and their payment information.

- A more extensive, but thorough, way to compare would be to use our **Reports > Downloads** section. You can download the full list of contacts, appointments, proposals, or invoices from service**minder** here for a given location. This would then allow you to run comparisons to your old system using Excel.

The more time spent on this step usually helps prevent surprises from cropping up after going live. Making changes to imported data can be tricky once locations have gone live, so it's best to find and iron out any issues as much as possible beforehand.

Franchisee Training

If you are onboarding with service**minder**, our onboarding specialists will set up recurring trainings and Q&A calls with both the franchisor team and the franchisees. This process can take between 1 - 2 months.

If you are training onboarding franchisees in-house, we suggest at least 3 weeks of training with new franchisees. However, at least a month provides less stress for all parties and provides ample time for them to learn the basics before "going live" and running their business.

We have provided a sample Franchisee Training Curriculum that you can use. We suggest tailoring it to your brand and industry. If you have SOPs, you may prefer to use what has already been created for your owners and brand admins.

How To Get Help

During initial Q&A, both franchisors and franchisees are welcome to submit support tickets for assistance. We provide free, unlimited email support.

> We are not set up for phone support, nor do we ever plan on offering 24x7 support via phone. We ask that you submit emails with details on what questions or issues you are experiencing.

Franchisors can email **support@serviceminder.io** or **support@serviceminder.zendesk.com**.

Franchisees can click on the **Got A Question?** tab in the Help section (both web and mobile app) and type in a subject and details, then click **Submit.**

> Our standard support hours are **8 a.m. - 6 p.m., Monday - Friday (central time)**. Our support mailbox is monitored after hours for any emergency or critical issues. The entire platform is monitored and alerts on call personnel 24x7 for any operational issues.

Onboarding Timeline for Support

By default, we provide Level 2 and higher support. Brands that are successful become proficient in adding value for their franchisees by learning how to best apply the capabilities of service**minder** to their brand.

Level 1 covers basic "how to" support, especially in the context of the brand such as specific services, invoicing workflows, etc. Level 1 support is handled by service**minder** during the onboarding process and for the first 6 months after "go live" launch of the franchisees.

Level 1 support of the franchisees is then transitioned to the brand.

Levels of Support

Standard support – Level 2 support (built into the per month/per location serviceminder cost)

- Level 1 support done by the Brand (that means initial questions go to the brand first, example the "Got a Question" found in help in web and app directs to the brand first)
- Brand escalates help tickets to service**minder**, support when they are not able to assist or it's a technical bug-related issue
- Branded service**minder** training videos are created by the brand, with service**minder**, guidance as needed.

- New franchisee onboarding and training is handled by the brand

Elevated support – Level 1 support ($35/per month/per location)

- Level 1 support is done by service**minder**, "Got a Question" in help goes directly to service**minder** support
- service**minder** loops in the brand admin on support tickets where the brand must make the change or approve
- service**minder** and the Brand team work together to create training videos as needed for new franchisee onboarding
- New franchisee onboarding and training is handled by the brand

Dedicated support ($10,000 per month)

- Brand receives a dedicated service**minder** Client Success rep
- The primary point of contact for all support tickets and phone calls
- The dedicated service**minder** Client Success rep works directly with the brand team to create content videos, provide training, and so forth
- New franchisee onboarding and training is handled by the brand

---

FAQs

After initial onboarding, what is it that the brand team does and what is it that the SM team does?

New organizations are created by the brand onboarding team. Data is added by the service**minder** onboarding team. The owner (franchisee) adds location-based information to their organization and does final set-up (such as taxes and QuickBooks syncing).

If you wish to set up your new franchisees with an additional training, you can send a Support ticket and service**minder** will organize a 1-time, 30-minute Q&A call with your onboarding owners. We ask that someone from your onboarding team or the owners FBCs/FBAs be on that call as well.

> This should be a time for questions and answers. The SM team will not provide an in-depth instructional on the basics of service**minder**. The owners should have been using the tool for weeks prior and gone through your brand-led training of best practices using SM. Please see our suggest **training curriculum**.