

What We Do vs. What You Do

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Overview

If this is your first time onboarding a brand with serviceminder, we understand that it can get a little confusing about what the divvying up of responsibilities may look like between your team and ours.

We understand that your FBCs/FBAs are busy with the business side of instruction, so we do not expect your team to become serviceminder instructors. There are still some things that we cannot/should not do on your behalf.

This article outlines what the expectations should be for smooth transition and a happy partnership.

What We Do

This is for brands that purchased the Level 1 technical support:

- Level 1 Franchisee Technical Support
 - Includes **Got a Question** tab in SM or email to support@serviceminder.io, examples of questions we answer:
 - How do I set up a user? How do I enter a payment? How do I set up my teams for scheduling?
 - Something is not working right in SM, bug or system issue
- Creating Training Videos
 - Technical training content on how to use SM
- New Org Backend Set Up
 - Sets up accounting classes (territories) in the new Zee's organization
 - Deploys settings to the new organization



You must detail what settings to deploy to the new Orgs. We cannot guess if you have print templates or custom fields or specific discounts/offers that are good or outdated. Please include everything in detail including what is the correct brand account to deploy from (if you have multiple brand accounts).

What the Franchisor Does

- Questions on business process and business flow.
 - When do I create an invoice? Do I collect deposits, if yes, when is best practice?
- Creates the New Organization in SM for all new Zees

Creates the new Organization member for all new Zees

- If you have a parent corp, their onboarding team may do this part on behalf of your brand. If you are unsure, please reach out to get clarification on this step for your side.
- Approves escalated tickets
 - If the franchisee wants contact ted, invoices deleted, or proposals deleted in SM - all this must be approved by a brand team member in the SM ticket first before SM support can do the needed action item.
- Outbound communications to Zees
 - All outbound communication to franchisees come from the brand, this includes communication about SM. Training management invites, sending of SOP's, and information regarding rollout, usage, billing, and so forth all comes from the brand team.



Either upon written or verbal agreement, but the communication to franchisees must come from the brand team.

Do's and Don'ts

- **Do** send us questions, that is what we are here for.
 - Please **Do Not** give out your SM Onboarding Specialist or Brand Admin's contact information to your owners.
 - There is only one of them and they cannot possibly handle the volume of questions from dozens or more franchisees, especially since they work with multiple brands simultaneously.
 - They do not need to form a habit of going to those individuals for answers or help when we have an entire Support team monitoring the ticket system.
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