



TaskoMatic Builder Worksheet

TaskoMatic Name: **New Client/Customer TaskoMatic** Purpose: **Welcome and bring on board new Client**
(New Sequence) (Description)

Tools > TaskoMatic Editor – Create New Folder for New Type in Tree, Choose New Sequence for NEW TaskoMatic

TaskoMatic Action No. 1 Sequence Name: Printed Thank You

Description: Send Printed Thank You Letter for New Client/Customer Welcome

Action Name: Send Letter Name the step ex. Send Email, Call Prospect)

Description: Send Printed Thank You Letter for New Client/Customer Welcome Describe the action ex. Send email to request next step, Call to engage client and ask the following questions...1.) 2.) etc.)

Type: Manual Printed Email

Select Document (printed/email only): New Client Welcome

Subject: (email use only) _____

Discovery Guide: Not Used _____

Days to Complete Task: 2

Days to Next Task: 2

Assign Task to: Initiator _____ (Initiator is default and the one to launch)

TaskoMatic Action No. 2 Sequence Name: Phone Call to Confirm

Description: Phone Call to Confirm Order/Welcome Client to your Company or Organization

Action Name: Phone Call Name the step ex. Send Email, Call Prospect)

Description: _____ Describe the action ex. Send email to request next step, Call to engage client and ask the following questions...1.) 2.) etc.)

Type: Manual Printed Email

Select Document (printed/email only): _____

Subject: (email use only) _____

Discovery Guide: Not Used _____

Days to Complete Task: 2

Days to Next Task: 2

Assign Task to: Initiator _____ (Initiator is default and the one to launch)

TaskoMatic Action No. 3 Sequence Name: Handwritten Thank YouDescription: Write Handwritten Thank you for Sale and Welcome Client/Customer to your "family"Action Name: Hand Write Letter Name the step ex. Send Email, Call Prospect)

Description: _____ Describe the action ex. Send email to request next step, Call to engage client and ask the following questions...1.) 2.) etc.)

Type: Manual Printed EmailSelect Document (printed/email only): Welcome to our Family of Customers

Subject: (email use only) _____

Discovery Guide: Not Used _____Days to Complete Task: 2Days to Next Task: 0Assign Task to: Initiator _____ (Initiator is default and the one to launch)TaskoMatic Action No. 4 Sequence Name: Call to follow upDescription: Call to follow up -Action Name: Call Name the step ex. Send Email, Call Prospect)Description: Ask what they like best about our organization Describe the action ex. Send email to request next step, Call to engage client and ask the following questions...1.) 2.) etc.)Type: Manual Printed Email

Select Document (printed/email only): _____

Subject: (email use only) _____

Discovery Guide: Not Used _____

Days to Complete Task: _____

Days to Next Task: _____

Assign Task to: Initiator _____ (Initiator is default and the one to launch)