

CUSTOMER JOURNEY



1 Deployment Strategy

- Join kickoff call and get oriented (45 min)
- Membership health analysis (30 min)
- Align on plan building call (60 min)

2 Marketing Strategy

- Align on marketing strategy call
- Approve Smart Maintenance Plan
- Asset creation

5 Training Protocols

- Office/Admin Training
- CSR Training
- Field Pro Training
- Installers Training

4 Inventory Delivery

- Kits arrive onsite prior to training

3 Operations & Integrations

- Schedule SmartAC dashboard setup call (45 min)
- Inventory planning and management
- Schedule training logistics call
- Complete ServiceTitan integration

6 Official Launch

- Validate workflows and readiness
- Review launch checklist (20 min)
- Address questions

7 Post-Launch

- Quarterly goal review
- Best practices review
- Follow-up training