

## H-12 Concluding the Transaction

Procedure: *Concluding the Transaction*

Purpose: You have two goals in this “Final Procedure.” The first is to tactfully ask to be paid. The second (and more important purpose) is to leave a few final positive Moments of Truth with your customer.

Overview: Next to your first two minutes with the client, these concluding moments may be the most important time you can invest in making a Cheerleader. All too often well-meaning (and hard working) technicians leave some very negative Moments of Truth with their customer ... right at the end of the job, when it will be remembered the most! If you focus on this Procedure you WILL create more Cheerleaders and make your customers feel great about you and our company.

After all, you have already investing a huge amount of time and emotional effort in creating a “Cheerleader candidate” out of this homeowner- just a little more work will make them a guaranteed Cheerleader. Well worth it, wouldn't you say?

### Steps:

1. **Its time to get paid-** This is an important time in your transaction with the homeowner. For one thing, it doesn't take a rocket scientist to figure out if our company doesn't get paid, we can't pay your salary! But also the manner in which you ask for payment is a very important Moment of Truth.
  - A. **First, check your paperwork-** Actually, before you even arrived at this home during your initial checks you should have looked to see what payment terms the office has arranged with this client. Always double check again before you proceed to the next step.
  - B. **“Mrs. Jones, do you have a check number I can write on your invoice?”** Its true, we do offer VISA and MasterCard, but we prefer to be paid in checks or cash, so suggest checks first.
    1. When you get the check glance at it to make sure it is signed and the amount is correct. (Do not “suspiciously” scrutinize it.) Then write the number on the work order and have the customer sign it. Then give them the back copy of the Work Order or if a previous Carpet Cleaning Inspection wasn't performed give them the front copy.
    2. Place the check INSIDE the right hand inside Job Folder pocket, held in place by the paper clip. (It's a very negative Moment of Truth for both us AND the customer if you lose their check!) Also put the completed and signed Work Order in the same pocket.
  - C. **When the customer wants you to “bill” her-** Once again, be sure the office has not pre-authorized this charge. If not, mention that to make it easier for them we do accept VISA and MasterCard. If the customer still wants to “charge it,” ask if you can call the office for a charge number and turn the customer over to Accounting.
    1. If the office authorizes the charge write the payment terms on the line in the Work order marked “Terms” and have the customer sign and give them a copy as above.
    2. Stow the signed Work Order as noted above in B2.

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2. **Don't "take the money and run."**- You know, you've worked this hard to make a Cheerleader out of the customer, don't give the impression you're only interested in payment and leave as soon as you get it.
  - A. **Function as an "interested consultant"**- Remember, by now the customer should view you both as an expert and even more importantly, as a trusted friend. So go ahead, be a friend, show "personal interest" and give your client any hints you can think of on maintaining her house. If you display this sincere personal interest in her she will repay you by becoming an enthusiastic Cheerleader.
  - B. **Say goodbye to the kids, pets, etc.**- You get the idea. You should now be a "friend of the family." Act like one. Friends have fun with each other and within reason you should also. (Just don't forget you have a schedule for the day and it is a VERY negative Moment of Truth to arrive late for your next customer!)
  - C. **Try very hard to collect everything you brought into the house**- This is why it is so important to follow the same Production System in each home. See the Production Section in the Operations Manual for more information.
3. **Thank you and goodbye**- Never, ever forget what you owe your customer. Start with your job and go on from there. So it is only logical that you thank her in a proper manner.

- A. **"Mrs. Jones, I've enjoyed meeting you. We appreciate your business. Goodbye."**- Simple, right? But oh-so-beautiful to the ears of your client!

NOTE: Generally it is appropriate to shake hands with the customer as you say good-bye even if the "personal dynamics" weren't right to do so at the start of the job. After all, by now you have developed a friend and friends normally shake hands. It's that simple. (Let females "take the lead" by extending their hand first.)

- B. **On to the next potential Cheerleader!** But remember, the job's not done till your Production Day Sheet paperwork is completed and your Job Folders are turned in!

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Procedure: *Nothing Left Behind (Job Check List)*

Purpose: For both our customer's safety and for our own efficiency it is important that we use this check list.

Overview: Think about it. At best it would be a very negative Moment of Truth if our customer's kids or pet ever got a hold of something potentially dangerous because we forgot it on the job site. (At worst it would be disastrous!) So use this list to ensure that "nothing gets left behind". This checklist can also be used to communicate with one another within the company.

### Steps:

1. **Before you leave the shop-** Verify that you have a Job Check List for each job inserted behind the Work Order in each Job Folder.
2. **Before you go into the home- Insert Job Check List into Truck Clipboard.** Note: remember that this clipboard stays in truck hanging on hook by side of back doors.)
  - A. **Keep track of everything leaving the truck-** Check off, "Before" boxes for items that will be needed for the job and leave list in the back of the van so it can be accessible if you need anything else.
  - B. **Take all items into the home-** Place tools in the designated station area and start work.  
NOTE: Be sure to keep all tools with you for safety reasons.
3. **Upon completion of the job-** As you are loading the truck after the job review this sheet and check off, "After" items to insure that everything is loaded.

NOTE: There is a, "Special Notes" box that you can document anything you may want to communicate about the job. Use this to communicate with office, manager, and yourself.

NOTE: Review our Procedure: Residential Set-up List (Pre-inspected and priced)

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## Job Check List

Customer \_\_\_\_\_

Technician \_\_\_\_\_

Address \_\_\_\_\_

Date \_\_\_\_\_

City \_\_\_\_\_

Time In \_\_\_\_\_

Phone Number \_\_\_\_\_

Time Out \_\_\_\_\_

Email address \_\_\_\_\_

Special Notes

Before	Item	After	Before	Item	After
	Pre-Spray			Dri-Master	
	Wand			Vacuum	
	Stair Tool			Airmovers (quantity?)	
	Grandi Groomer			Stain Magic	
	Grandi Brush			Water Claw	
	Multi-Sprayer			Vac Attack	
	PowerForce Sprayer			Furniture glides	
	Door Mat			Grandi Comb	
	Dropcloth (s)			FloorGuards (upholstery)	
	Corner Guards			Lift Buddy	
	Connector Wrap			Door Guard	
	Red Relief			Upholstery Tool	
	Spotter Box ( <b>Check Contents!</b> )			Black Light	
	Floor Scrubber			Rug Rat	
	Turbo Vac			Other	
	PH Pen			Other	
	E-Z Spotter			Other	
	RX-20			Scotchgard container	

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Procedure: *Final Touch-Up Floor Cleaning*

Purpose: To reduce slip and fall hazards plus leave yet another positive Moment of Truth.

Overview: Surrounding “transition areas” between the carpet and hard surface flooring inevitably get tracked up and even wet during the carpet cleaning. Obviously overspray should be wiped up with a towel immediately. But this procedure deals with any tracking that has occurred during the cleaning process.

### Steps:

1. **Remove all cleaning equipment and perform the Post Inspection.** (*On the Job/Post Inspection* pages 1-3)
  - A. Give your customer(s) a fresh pair of shoe covers to wear during your walk through. Follow the steps in the “Post Inspection” procedure.
  - B. Note any tracked up walk off areas. Comment on these and mention to the home owner as a final step you’ll be working your way out of the home and leave these areas nice and clean. (This will be a reassuring MOT.)
2. **Clean the affected areas.**
  - A. **Use a microfiber mop.** Double check with the home owner and ask permission to “touch up” her floors as you leave.
    1. **On hardwood floors:** Use Basic Coatings “Squeaky” Floor Care system (available from Jon-Don) with a micro-fiber mop.
    2. **On ceramic floors:** Use StoneTech’s Stone and Tile Cleaner (also available from Jon-Don!) diluted 2 oz. per gallon of water. HINT: Keep both of these solutions pre-mixed in a 2 gallon pump-up sprayer for rapid and easy application.
  - B. **Talk with your customer.** Inform the home owner that you are doing this final “touch-up” cleaning for two reasons:
    1. To make sure the home is as clean as when you walked in plus ...
    2. You don’t want any soil tracked from the wood or ceramic back on to their sparkling clean carpets! (Customers LOVE a slightly obsessive-compulsive attitude toward cleaning on the part of our technicians!)

NOTE: This is a great time to mention our cleaning and restoration services for hardwood floors and ceramic tile and grout cleaning. Plus if you wish you can also offer the Squeaky Floor Care System from Jon-Don for resale to the home owner.

