1. Sales Closing Packet Information will be gathered by the Sales Agent
Project Manager Assigned

   ⊙ **Initial Project Set Up** in Initial Set Up   ↓²

   ☐   Menu Received and Given to Team

   ☐   Internet Assessment Completed

   ☐   VAR Info Received

   ☐   Project Manager Assigned

2. Kick Off Phase will be handled by the Project Manager – **24hrs to Contact Customer**
   - Initial Contact
     - Send a Welcome Email using the "**LingaPOS Welcome Package**" template
     - Assign yourself as the Project Manager in the CRM under the "**Info**" section
     - Follow up the Email with a Phone call
     - Schedule a Kick Off call – If one cannot be performed at the time of call
   - During Kick Off Call
     - Ask/confirm who they are processing with – need this for integrations
     - Confirm their "Projected" Go Live date for Zoho Project feed
       1. Mark your Outlook Calendar – BLOCK OFF THAT DAY FOR GO LIVE
     - Fill out the CRM under the info section "**Implementation Form – STEP 1**"
     - Confirm the Gathered packet information
       1. Menu
       2. Internet Assessment
   - Update your Project Feed with any notes gathered during this phase

   ⊙ **Kick Off Phase** in Kick Off   ↓²

   ⠿ ☐   ⊟Send Welcome Email

   ☐   Assign yourself in the Project Manager Field via CRM

   ☐   Follow Up Welcome Phone Call

   ☐   Kick Off Call Scheduled

   ☐   ⊟Kick Off Call

   ☐   Ask about Credit Card Processor

   ☐   Confirm Go Live Date and Process

   ☐   Fill out CRM with Customer Information

   ☐   Fill Out "Project Go Live Date" Field on Zoho Projects

   ☐   Gathered Packet Information

   ☐   Make sure Project Feed it up to Date

3. Menu Phase One:
   - Menu is Received from the Customer
     - 24hrs to Contact Customer for Meeting via Phone/ Email
   - Initial Menu Meeting with the Customer is Schedule
     - Allows PM and customer to be on the same page
   - Initial Menu Meeting with the Customer is Completed
     - Customer Agreed to Layout and design of menu
   - Menu is Escalated to the India Programming Team
     - IF Menu is in EXCEL format – SEND TO INDIA
     - If Menu is NOT in EXCEL formation – PM WILL PROGRAM THE MENU
   - Menu is Received from the India Team, or Completed by PM
   - PM to Finalize any Menu Adjustments
   - Update your Project Feed with any notes gathered during this phase

⌄ Menu Phase One in Menu Adjustments   ↓ᴬ₂

☐ Menu is Received from the Customer

☐ Initial Menu Meeting is Scheduled

☐ Initial Menu Meeting is Completed

☐ Menu is Escalated to India Programming Team

☐ Menu is Received from India Programming Team

☐ Last Menu Adjustments

☐ Make sure Project Feed it up to Date

4. Integrations Phase: (Typically Completed by Hardy/ Integrations Team)
   - Integrations Form / VAR Sheet Received
   - Customer File is Built
   - Linga Admin Setup is Completed
   - Download the File to the EMV/ PAX Devices
   - Update your Project Feed with any notes gathered during this phase

⌄ Integrations in Integrations   ↓ᴬ₂

☐ Integrations Form / VAR Sheet Received

☐ Customer File is Built

☐ Linga Admin Setup is Completed

☐ Download the File to the Devices

☐ Make sure Project Feed it up to Date

5. Menu Phase Two:

- Revision Meeting with PM and Customer Scheduled
- Revision Meeting with PM and Customer Completed
- Update your Project Feed with any notes gathered during this phase

Menu Phase Two in Menu Adjustments ↓↑

☐ Revision Meeting Scheduled

☐ Revision Meeting Complete

☐ Make sure Project Feed it up to Date

6. Hardware and Equipment:
    - Hardware is Shipped – Done and Update by Oscar/ Shipping Department
    - Hardware Set Up is Scheduled
    - Hardware is Delivered
    - Hardware is Set Up is Completed
    - Update your Project Feed with any notes gathered during this phase

Hardware and Equipment ↓↑

☐ Hardware has been Shipped

☐ Hardware Set Up is Scheduled

☐ Hardware is Delivered

☐ Hardware Set Up is Completed

☐ Make sure Project Feed it up to Date

7. Training:
    - BOH Training Scheduled
    - BOH Overview Completed – Send Customer Copy of Training via Box.com
    - FOH Training Scheduled
    - FOH Training Completed – Send Customer Copy of Training via Box.com
    - **Training Sign Off Sheet Sent**
    - Customer Returned Signed Training Agreement Document
    - Update your Project Feed with any notes gathered during this phase

Training in Training ↓↑

☐ BOH Training Scheduled

☐ BOH Training Completed

☐ Upload and Send Video of Training to Customer via Box.com

☐ FOH Training Scheduled

☐ FOH Training Completed

☐ Upload and Send Video of Training to Customer via Box.com

☐ Training Sign Off Sheet Sent

☐ Customer Returned Signed Training Agreement Document

☐ Make sure Project Feed it up to Date

8. Menu Phase Three:
   - Final Revisions Meeting Scheduled
   - Final Revision Meeting Completed
   - **Menu Sign Off Sheet is Sent**
   - Customer Returned Signed Menu Approval Document
   - Update your Project Feed with any notes gathered during this phase

⊙ Menu Phase Three in Menu Adjustments ↓↑

☐ Final Revisions Meeting Scheduled

☐ Final Revisions Meeting Completed

☐ Menu Sign Off Sheet is Sent

☐ Customer Returned Signed Menu Approval Document

☐ Make sure Project Feed it up to Date

9. Go Live:
   - Customer Goes Live with Software
     - Fill out "Date Live" Field on the Zoho Project Feed
   - Project Manager Follows Up Next Morning
     - Project Manager Calls the Customer the Morning after the Go Live Date
   - Project Manager Follows Up After First Week
     - Project Manager Calls the Customer the Week after the Go Live Date
     - Project Manager informs the customer to call technical support for further assistance
   - Technical Support Takes Over After Week One
   - Project Manager Follows Up at 30 Days
     - Project Manager Calls the Customer 30 days after the Go Live Date
   - Make Sure Project Feed is Finalized
   - Mark Project as COMPLETED
     - Move the Project to Archived

⊙ Go Live in Go Live ↓↑

☐ Customer Goes Live With Software

☐ Project Manager Follows Up Next Morning

☐ Project Manager Follows Up After First Week

☐ Technical Support Takes Over after Week One

☐ Project Manager Follows Up at 30 Days

☐ Make sure Project Feed is Finalized

☐ Input the "Date Live" on the Project Overview

☐ Mark Project as Completed