

New Customer Onboarding

CHECKLIST



Darryl Turner Corporation

- Sales Rep interviews new customer ____/____/____
(Date)
 - Obtained preferences _____
(Sales Rep Initials)
 - Preferred communication _____
 - Items they like about their current or past title company. _____
 - _____
- Other _____
- Sales Rep meets with Escrow Officer/Closer to review details from new customer interview.
____/____/____
(Date)
- Escrow Officer/Closer ***calls** the new customer on the phone to let them know that they have their preferences, have discussed with the Sales Rep and personally reviewed them. They then ask if there is anything additional they would like to add to the preferences. ____/____/____
(Date)
- Escrow Officer/Closer then confirms any communication details remaining with new customer offering direct lines, email addresses etc. ____/____/____
(Date)
- Sales Rep then receives completed copy of preferences. ____/____/____
(Date)
- Escrow Officer/Closer communicates with new customer by phone, proactively, each week to give peace of mind related updates.
 - Week 1: ____/____/____
(Date)
 - Week 2: ____/____/____
(Date)
 - Week 3: ____/____/____
(Date)
 - Week 4: ____/____/____
(Date)
 - Week 5: ____/____/____
(Date)
 - Week 6: ____/____/____
(Date)

*Our studies show that emails are significantly less effective than a phone call when attempting to communicate with a new customer.