Standard Operating Procedure Template

Utilizing the Consolidated Tracker

Purpose
To ensure all customer interactions, follow-ups, and lead statuses are recorded consistently in the Consolidated Tracker, allowing the team to manage leads, reminders, disputes, and referrals efficiently. This SOP outlines when to use each tab, how to update records, and how to maintain data accuracy.

References
Keep Clean Consolidated Tracker

Quick Reference – When to Use Each Tab

Tab Name	When to Use
Waiting List	Customer wants service but no immediate availability.
Lost Leads – Availability Issue	Customer didn't book because we couldn't meet their schedule.
Referral to Victor	Leads that are sent to Victor for handling.
Reminder Outreach	Sending scheduled follow-ups to past customers.
Estimate Reminder	Confirming and reminding customers of scheduled estimates.
Referrals	Tracking referrals from customers
LSA Lead Dispute	Documenting unqualified LSA leads for dispute.
New Zones	Checking if a location is within service area.
Date Reference	Calculating reminder intervals (3, 6, 9, 12 months).

Step-by-Step Guidelines

1. Accessing the Tracker

1. Open the Google Sheet Keep Clean Consolidated Tracker.
2. Ensure you have the latest version and correct editing permissions.

2. Recording and Updating Leads

a. New Leads from Local Service Ads, Website, or Calls

1. Create a new entry in the relevant tab based on the lead source.
    - **Waiting List** – For customers wanting service but no immediate availability.
    - **Lost Leads** – Availability Issue – For customers who could not book due to scheduling conflicts.
    - **Referral to Victor –** For leads sent to Victor for follow-up.
2. Fill in:
    - Date
    - Customer's name (or phone if no name)
    - Contact details (phone, email)
    - HCP Link (if applicable)
    - Reason for booking or reason for not booking
    - Notes (important context)
3. Update status if the lead books, declines, or becomes unreachable.

3. Reminder Follow-Ups

1. Reminder Outreach Tab – For sending scheduled reminders to past customers.
    - Use the Templates tab for approved text, email, and voicemail scripts.
    - Record completion date, sender name, customer's name, email, phone, and status.
    - Add notes if contact was unsuccessful or if details are missing.
2. Estimate Reminder Tab – For customers with scheduled estimates.
    - Include HCP link, cleaning date, arrival window, and reminder timing.
      Mark any special instructions in the Notes column.

4. Referrals

1. Log all referrals in the Referrals tab.
    - Include date, customer name, referral name, phone, and status.
2. Update once referral contact is made.
3. Mark as "Pending" until resolved.

5. Lead Disputes

1. For incorrect or unqualified LSA leads, use the LSA Lead Dispute tab.
2. Record:
    - Date of call
    - Phone number or lead ID
    - Status ("Pending" until resolved)
    - Reason for dispute (be specific)

6. Service Zones

- Refer to the New Zones tab before confirming service availability.
- Red zone entries = Do Not Serve.

7. Date Reference

- Use the Date Reference tab to quickly calculate 3, 6, 9, and 12-month intervals for reminders.

8. Data Accuracy and Maintenance

1. Double-check entries before saving.
2. Use consistent formatting (dates in YYYY-MM-DD format, phone numbers in standard format).
3. Keep notes factual and relevant.
4. Archive completed or closed entries monthly to keep the sheet manageable.