

# complete client process

## ASANA PROJECT TEMPLATE FOR HOME ORGANIZING CLIENTS

### **INQUIRIES FOR IN-HOME:**

- schedule call
- tag for followup
- schedule consultation
- take pictures
- decide package & scheduling
- take payment & schedule all dates
- create brief writeup of client plan
- send writeup & mood board

### **FIRST TIER SESSIONS:**

- decluttering
- sorting
- donation & trash
- add new info to client folder
- add hours worked to client package doc
- document direct consultative hours

### **POST-SESSION:**

- space planning
- product sourcing
- shopping
- sell further sessions as necessary
- document end results of services
- take pictures
- get testimonial
- set followup schedule

### **SECOND TIER SESSIONS:**

- organizing

### **THIRD TIER SESSIONS:**

- maintenance