Send Client Email and Reminder to Sign Implementation Wizard

Send the Client Email and Reminder

After the kick off call meeting, utilize the template attached to the smartsheet to send a follow up email. Be sure to include the meeting agenda/minutes from the kick off call and a due date for the completed Implementation Wizard.

The completed Implementation Wizard must be signed off to prevent potential delays in the Implementation process. In addition, information regarding training, plansource exports, and the EDI process is provided in the email template.

Save the Client Email

The follow up email needs to be saved in Salesforce under the Implementation project and on the XDrive in the client folder.

Salesforce:

1. Pull up the client in Salesforce
2. Select Projects from the top menu bar
3. Click on the Implementation Project
4. Save the follow up email under the notes and attachments section

OR

1. Type in the project number
2. Save the follow up email under the notes and attachments section

XDrive:

1. Follow the path: **X: Company/PlanSource/Clients**
2. Locate the new client folder

   Note: Remember to search for the client under the broker's name
3. Click on the Implementation Folder
4. File the email in the project manager folder under meeting agendas