

Moments of Excellence

The Excellence Guide for every session.



Preparing for the Session

- ☐ Do I have all the tools that I will need for the project?
- ☐ I'm an Expert Organizer. Do I look the part?
- ☐ Has my cell phone been silenced?

Session Start

- ☐ Did I arrive on time?
- ☐ Did I introduce myself with a smile, handshake and a business card (1st Session)?
- ☐ Did I ask for a tour of the space we will be working in as well as any other spaces that may be visited (1st Session)?
- ☐ Did I explain to the client my process (1st Session)? *The 5 Steps of Organizing*
- ☐ Did I review with the client the goals for the session and the time that we are scheduled for?
- ☐ Did I ask to take before pictures of the space?

Mid-Session Check

- ☐ At mid-session, did I check-in with the client to get a feel for how they think things are going?
- ☐ If necessary, did I make adjustments to the original goal and discuss it with the client?

Session Wrap Up

- ☐ Does the space that we worked in look better than when we started?
- ☐ Is everything labeled properly?
- ☐ Did I create a WOW factor?
- ☐ Did I take after pictures of the space?
- ☐ Did I walk through the space with the client and explain what was done, where things are, and how to manage the systems that were created?
- ☐ Did I fill out the "Today" card and review it with the client?
- ☐ Did I ask for another appointment?
- ☐ Did I scan the "Today" card for the client file?
- ☐ Did I close out and/or collect payment through Square?
- ☐ Would the client miss me if I did not return? ☐ Yes ☐ No

Closing the Session with Central

- ☐ Have I completed a Session Recap?
- ☐ Have I sent a Thank You Card (1st Session)?
- ☐ Have I uploaded all documents and images to the client file?
- ☐ If I collected cash or check, did I deposit it in the bank within 24 hours?

CEO Name _____ Client Name _____ Date _____