

Croshaw Printing & Direct Mail, Inc.

1220 E. 4th Street Long Beach, CA 90802 • 562-437-8330 • Fax 562-437-6181

Customer Service Task Sheet

Client: _____ **Date:** _____

Request for Quotes

Did you?:

- Respond with quote in less than 1 hour for less than 10,000?
- Under 4 hours for 10,000 to 25,000?
- Email *and* telephone call follow-up on all requests.
- Ask for a face to face meeting within 3 days of this quote request?

One-on Ones (First Meeting)

Did you?:

- Have prepared sample quotes with you at the meeting?
- Have voter counts ready for client?
- Inform client of:
 - Deadlines w/calendar
 - Payment procedure (50% down, plus full payment date)
 - What is included in price (design thru mail...demonstrate value)
- Have sample pieces ready prior to meeting?
- Talk about our referral discount program?
- Ask about worksheets?
- Set a date to talk about the design for the next mailer?
- Get a clear idea of their piece from the meeting?
- Send a thank you letter following the meeting (day of)?
- Complete an invoice day first payment is received?

Proof-Design

Did you?:

- Complete a proper turn around:
 - 5.5 x 8.5: 9 hours (or letterhead, remits, etc.)
 - 8.5 x 11: 13 hours
 - 11 x 17: 15 hours
- Give a phone call reminder with email of proof?
- Request data from Politicaldata with final approval?
- Proof read piece before it went to pre-press?

Printing

Did you?:

- Establish 4 business day turn around from approval?
- Email client when piece goes to print?
- Remind client of full payment day/pickup overs?
- Press check by two people?

Mailhouse

Did you?:

- Request mail postage check from Paul day of printing?
- Inform client when piece will hit mailboxes?
- Pick up samples/overages for client?
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