FLOOFINS & CO.

Consultation Visit Checklist

Things "to do" at a client consultation meeting.

- Prepare a client file/Attain client file from the office.
- Meet and greet both clients and pets.
- Find out about the pets! Review PPS instructions and make additional notes as needed. Complete both pet and household profiles. Walk through the home.
- Review Floofins & Co. informational materials and answer any questions about the company.
- Collect signed client forms. Make sure vaccination records are included.
- Collect two sets of house keys and test them.
- Take a photo of each pet for PPS records.
- Walk client through and complete the service agreement.
- Review time blocks and book first appointment.