

## Text Item Properties

### Text:

<span style="font-size:24px; color:blue;">IN FLIGHT</span>

<span style="font-size:12px;">Cost Share Analysis/ROI prepared and sent to Gaby/Business Planning</span>

- o Cost Share Analysis/ROI returned from Gaby/Business Planning (Task within) Requested DOA approval from Sales for Cost Share/ROI
- o DOA Approval Received (Task within) ROI/Cost Share presented to the customer for their review Sites approved by customer to begin construction
- o Attach customer communication
- o CSM to add notes for number of sites & action taken ex: (Customer released 100 sites to begin construction, email sent to SRC to promote)
  
- o Serviceable Sites approved to be released per rollout plan
- o Attach customer communication

Project Details

Pre Project

New Installs

Conversions

Upgrade/Downgrade

Tasks

Call Log

Documents

Ref.

## IN FLIGHT

Cost Share Analysis/ROI prepared and sent to Gaby/Business Planning o Cost Share Analysis/ROI returned from Gaby/Business Planning (Task within) Requested DOA approval from Sales for Cost Share/ROI o DOA Approval Received (Task within) ROI/Cost Share presented to the customer for their review Sites approved by customer to begin construction o Attach customer communication o CSM to add notes for number of sites & action taken ex: (Customer released 100 sites to begin construction, email sent to SRC to promote) Serviceable Sites approved to be released per rollout plan o Attach customer communication o CSM to add notes for number of sites & action taken ex: (Customer released 15 sites for scheduling, processed Mass Update to Stage to "Order") Bulk Site Cancellation Request o Attach customer communication if applicable o CSM to add notes for number of sites & action taken ex: (Customer cancelled sites, processed Mass Update to Stage sites to "Remove" & Opportunities to "Closed/Archive) Site(s) sent to Business Planning for Cost Increase on ROI Bulk Reschedule Request received from the customer (this would be very tedious if required for single sites. I think it s a good idea for a bulk reschedule). o Attach customer communication o CSM to add notes for number of sites & action taken ROE Related Task Hosted Weekly Call o Call Summary sent out (task within)-Reminder? Sent Tracker Mass Update Processed o CSM to provide notes on what was updated & any relevant attachments Customer escalation o CSM to provide notes & relevant attachments Sites Placed on hold o Attach