



Working together to build a better future

<b>QF104</b>	<b>MEET and GREET CHECKLIST</b>
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Customer Name: \_\_\_\_\_ Date: \_\_\_\_\_ CIMS ID: \_\_\_\_\_

LA Name \_\_\_\_\_ Progress Note # \_\_\_\_\_

<b>Customer need identified</b>	<b>Tick when completed</b>
- Shift days – <b>Circle</b> Mon Tues Wed Thurs Fri Sat Sun	<input type="checkbox"/>
- Shift Times- <b>Circle</b> Morn Lunch Tea Domestic Bed Sleep Over	<input type="checkbox"/>
- Shift Requirements	<input type="checkbox"/>
- LA Requirements (gender, qualifications etc)	<input type="checkbox"/>
<b>Discuss with customer how meet and greet contact is to be made:</b>	
- Office to book for both parties (preferable)	<input type="checkbox"/>
- Customer to contact LA	<input type="checkbox"/>
- LA to contact customer	<input type="checkbox"/>

<b>LA sourced</b>	
- LA contacted	<input type="checkbox"/>
- Shift details given	<input type="checkbox"/>
- Shift availability agreed to	<input type="checkbox"/>
- Customer details given	<input type="checkbox"/>
- Confirmation of meet and greet date and time	<input type="checkbox"/>
- Discuss meet and greet code of conduct with LA (confidentiality, professionalism, punctuality)	<input type="checkbox"/>
- Remind LA to take ID Badge	<input type="checkbox"/>

<b>Confirm time and date of meet and greet with both customer and LA</b>	
- Via text	<input type="checkbox"/>
- Via phone	<input type="checkbox"/>
- Via email (including meet and greet Code of Conduct)	<input type="checkbox"/>

<b>Add meet and greet into customer roster</b>	<input type="checkbox"/>
<b>Set reminder in CIMS to follow up with both customer and LA immediately after the meet and greet is scheduled to be completed</b>	<input type="checkbox"/>

<b>SDO follow up tasks</b>	
- Follow up with customer and LA completed	<input type="checkbox"/>
- Document feedback (training/shift commencement)	<input type="checkbox"/>
- Set reminder to follow up 1 week after shift commencement	<input type="checkbox"/>
- Update roster as required	<input type="checkbox"/>
- Send roster to customer and team	<input type="checkbox"/>

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SDO Name: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Manager Use:**

	Customer note check		Customer contacted re: experience
	Roster check		LA contacted re: experience
Sign		Date	

LA Contacted	Response	Date