

The Consultation Process – What to Expect

Customer Insights • Scheduling Optimization • Lead Spend Optimization • Operations Visibility • Automation

Step 1 – Free 45 Minute Initial Consultation

An Arrow consultant reviews your intake form with you, discusses your business concerns, and explains how Arrow can address them through one of three development tracks:

- Track A: Scheduling Optimization w/ CustomerIQ
- Track B: Lead Spend Optimization w/ CustomerIQ
- Track C: Custom Software Solution

You Will Receive: an info packet explaining your development track, a tailored consultation schedule & a development roadmap to address your business concerns with Arrow.

Step 2 — Development Consultation

(For tracks A & B only) Your Arrow analyst reviews customer insights from your data with you and (for all tracks) discusses your unique business systems to define specifications for your product delivery.

Tracks A & B – CustomerIQ Consultation

- Discover your high lifetime value customer groups, what determines a customer's group, and how each group supports your business.
- (Scheduling optimization) No-show risk analysis by customer group (timing, demographics, distance, service type, spend volume, etc.)
- (Lead spend optimization) Lifetime value analysis per customer group, lead conversion analysis by channel.

Track C – Custom Software Consultation

- Potential solutions include: automated emails or SMS alerts, KPI visibility dashboards, integrations between tools (e.g., CRM <-> invoicing <-> scheduling <-> inventory) to eliminate copy-paste work, and custom mobile apps for systems access in the field.
- Your business' solution may be a custom software from Arrow or a configuration of 3rd party software. Depending on needs and complexity.

Step 3 — Implementation & Delivery

Arrow will deliver your optimization solutions through custom software or build targeted custom tooling. Software is modified to your feedback, thoroughly tested, and supported beyond initial deployment.

- A scheduling tool (suggests times customers are most likely to attend service appointments) – for scheduling optimization track
- An optimization plan and monitoring system for lead conversion. – for lead spend optimization track
- Configuration of existing software or light custom tooling – for custom software solution track
- Ongoing IT support (operation instructions, occasional bug fixes, etc.) – all

Book your free initial consultation today at calendly.com/arrow-consulting



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Let's chat! Book your free consultation
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