Front.com

Professional Services Front Setup Checklist

Welcome to Front, the customer communications hub for professional services teams. You focus on the client—we'll take care of the rest. Front streamlines communication and collaboration to help your team deliver extraordinary experiences at scale.

From law firms to creative agencies, HR firms to consulting groups, this checklist will help you set up Front for your professional services team. Got a question? No problem. Reach out to onboarding@front.com.

STEP 1:

Add your Structural Elements

- [ ] Add your inboxes
  - We recommend organizing inboxes by the group of people handing the messages. For some teams this means handling a VIP customer (example: front@company.com), while others might operate in a pooled model (example: hello@company.com).
  - Tip: Front is an omnichannel platform, so be sure to add SMS, WhatsApp, phone, and more to get a full view of a customer's timeline. Be sure to add all those unique company email addresses too!
- [ ] Import your contacts
  - Use the provided CSV template to easily and quickly upload your contacts.
  - Tip: Your team can use the Contact Details plugin to see a full timeline of communication with each customer. You can see calls, emails, texts, and more.
- [ ] Import your account information
  - Use the provided CSV template to upload all of the companies or organizations your team works with.
- [ ] Add your favorite apps and tools
  - Natively integrate 75+ apps into Front so your team can access them all without leaving their inbox.

STEP 2:
Build your Team Workflow

- [ ] Determine your message triaging with assignments and routing
    - Build rules to automatically assign conversations based on the client, service requested, and more.
- [ ] Create tags to track topics and your organization's key performance indicators
- [ ] Build message templates to allow your team to quickly reply to common questions or schedule client meetings
- [ ] Automate your processes through rules
    - Example: Use the rules library to auto-tag all conversations from your VIP customers, so your team can easily and immediately see when they write in.
    - Example: You can use the rules library to escalate conversations to a manager or team based on key words from your clients.
- [ ] Create SLAs for your team to respond to on time, every time
- [ ] Create CSAT surveys and signatures to capture customer satisfaction in every interaction

---

STEP 3:
Invite and Train your team

- [ ] Have your team attend a live Front Training Session
- [ ] Invite your team
- [ ] Have the team build scheduling links with Front Calendar to invite clients to meet