**SERVICE CHECKLIST TEMPLATE**

**Closet Audit:**

**TOOLS YOU NEED**

- ❏ Styling kit:
    - ❏ Tape measure
    - ❏ Trash bags - 8-12
    - ❏ IKEA bags - 4-6
    - ❏ Consignment bag - 1-3 (a reusable grocery store bag works well for this!)
    - ❏ Tags for alteration notes
    - ❏ Pens for writing on tags
- ❏ Laptop or cell phone for taking client session notes
- ❏ Phone/camera for session photos
- ❏ Business cards
- ❏ Follow up:
    - ❏ Thank you cards
    - ❏ Style Memo Template

**THE PROCESS**

- ❏ *Client Consult*
    - ❏ Review Style Questionnaire / client's style
    - ❏ Take measurements + write down in your notes
        - ❏ Bust
        - ❏ Waist (at belly button)
        - ❏ Hips
        - ❏ Inseam
    - ❏ Review budget for shopping for new pieces (if following session with shopping)
    - ❏ Give client a brief overview of how the session will go and that you'll be taking notes on your phone / laptop. Let them know that this will go at their pace, but that you have allotted 3 hours and you'll keep them on track. If they have a large closet and you think they will need a second session, tell them this up front.
    - ❏ Check with client if photos are ok + social media
- ❏ *The Clean Out!*
    - ❏ Take before photos
    - ❏ Pull everything out and go through!
        - ❏ Start with tops; pull out all tops and place on bed. Go through each item and place in one of the five piles listed in the next section. Continue on through their wardrobe in the categories listed below:
        - ❏ Dresses/skirts
        - ❏ Pants/shorts
        - ❏ Shoes
        - ❏ Workout / athleisure wear
        - ❏ Accessories - bags, scarves, jewelry, belts

- ❏ CHECK IN! About an hour - hour and a half in, check with your client to see how they are doing.
- ❏ Sort into 5 piles:
  - ❏ Keep
  - ❏ Tailor - use your logo tags to make alteration notes
  - ❏ Replace - use your tags to mark items that can be replaced once new are purchased
  - ❏ Donate - place in trash bags
  - ❏ Consignment - place in a dedicated bag
- ❏ CHECK IN! Around the 30-45 minute mark, check with your client to see how they are doing.
- ❏ Put things back in + organize
  - ❏ By sleeve type (sleeveless, short sleeve, long sleeve, etc.) and light to dark (white, cream, brown, red, orange, yellow, ending at black). Do this for tops and dresses.
  - ❏ Fold sweaters
  - ❏ Pants hang or fold by leg type
- ❏ Give the grand closet tour! Let your client know how and why you've organized their closet in this specific way.
- ❏ Take after photos

❏ *Your Admin Work*

- ❏ Immediately after the session, take the trash bags of items to be donated to a charity store; get the client's tax receipt! It is up to the client to itemize. You can write down that you donated X number of bags on the receipt.
- ❏ Schedule your time to take items to a consignment store.
- ❏ Schedule an hour of your time to complete the Style Memo + follow up below.

❏ *The Follow Up*

- ❏ Take items immediately to be donated
- ❏ If a new client or first session, send a handwritten thank you note
- ❏ Via email send:
  - ❏ Style memo with any notes they need to know from your session. Examples include:
    - ❏ Itemized shopping list of pieces they should purchase to help fill the holes in their newly cleaned out closet
    - ❏ Lookbook if making outfits.
    - ❏ Dressing for body type guidelines, etc.
    - ❏ Closet organization recommendations: slim felted hangers, bins for organizing, etc.
  - ❏ Tax receipt from items donated to charity
  - ❏ Information on their pieces that were taken to consignment, if any. I.e. the consignment store policies, contact info.
  - ❏ Give them a link or proposal for how they can work with you next!
- ❏ Add them to your newsletter list.

- ❑ Set a calendar reminder to follow up with them 1-3 months post service or at the next seasonal change.

**HELPFUL TECH TIPS**

- ❖ Send clients their tax receipts in a professional looking PDF. **Download the free app Genius Scan,** which lets you take a photo and turn it into a PDF! Email it to yourself so you can include this in their Style Memo follow up email.
- ❖ **Create dedicated Google folders for each of your clients**. Inside of those folders, create seperate folders for each session you book with the client and store all info in those folders: style consult, client agreement, session notes, a copy of their thank you card, tax receipt.
- ❖ Download the **free app Hurdlr** to track your mileage driving to clients' homes, charity stores and consignment stores! Future tax deduction!