Client Checkin Duties

- Greet the Client.
- Verify the client's name, address, and contact info on the referral form.
  - Note on the referral form that information is correct or which items need to be updated.
- Write vehicle/truck size on the whiteboard and the green check-in sheet.
- Determine if the vehicle is empty. If not:
  - Make sure that the shopper knows this and adjusts the available space accordingly. For example, if the truck is 1/2 full, the shopper must stop adding items when they hit 35% instead of the usual 70%.
- Give the client a Target gift card and record the card # on the green check-in sheet.
- Review the list of shoppers and determine which shopper is available. Assign a shopper and write the shopper’s name on the whiteboard.
- Explain bonus items to the client and give the client a bag to shop for these items.
  - Ask the client to take these items to their vehicle before meeting with their shopper.
  - If the shopper is ready, the bonus items can be shopped for at the end of their visit.
- Introduce the client to their assigned shopper.
- Put an orange tag with the client’s name on the back of their vehicle.

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