

**Request for Staff Worksheet**

**Setup, Integration, and Training**

To ensure a smooth and efficient setup of your 2X Solutions platform, we’ll need to coordinate with your team members across several key areas. Please fill out the information below with the appropriate contacts for each stage of the setup, integration, and training process. Feel free to list multiple people in each section if necessary.

1. **Telecom and Account Setup**

This individual should be familiar with your phone queue system, including managing queue numbers and ensuring no recordings are present on the queue number provided to us.

* Name:
* Email Address:
* Phone Number:

**2. Workflow and Script Creation / Customization Prompts and Fine-Tuning**  
This person will assist in drafting or outlining call scripts, voicemail scripts, and determining call workflow frequency. They’ll also provide common customer questions or objections that may come up on a call and identify any language that must comply with regulations or align with your business policies. 2X Solutions can offer examples and guidance here.

* Name:
* Email Address:
* Phone Number:

**3. CRM Integration**  
Typically your IT specialist or someone familiar with your CRM system. This individual will help integrate webhooks and APIs for real-time data sharing.

* Name:
* Email Address:
* Phone Number:

**4. Approvals**  
These are the people responsible for reviewing and approving the final scripts and workflows created by 2X Solutions.

* Name:
* Email Address:
* Phone Number:

**5. Team Training**  
Include anyone who will need training on the 2X back office to monitor and adjust the system. Also, list individuals who will help prepare the team members responsible for answering AI-initiated calls.

* Name:
* Email Address:
* Phone Number:

Thank you for your prompt response. We’re excited to get started and look forward to working closely with your team!