



From WhatsApp to Structured **Coordination**

A 30-day, week-by-week plan to move your cleaning team off spreadsheets and group chats — without disrupting live jobs or confusing your staff.

WRITTEN FOR

Operations Directors & Managers
in commercial cleaning & facilities

heyteam.ai

• WHY THIS MATTERS

WhatsApp got you here. It won't get you to 20 sites.

Spreadsheets and group chats are brilliant when you're small. But as sites multiply, the same tools that felt nimble become the thing that breaks at 5:47am — when a cleaner doesn't show and the only person who can fix it is scrolling three chats and a spreadsheet to find cover.

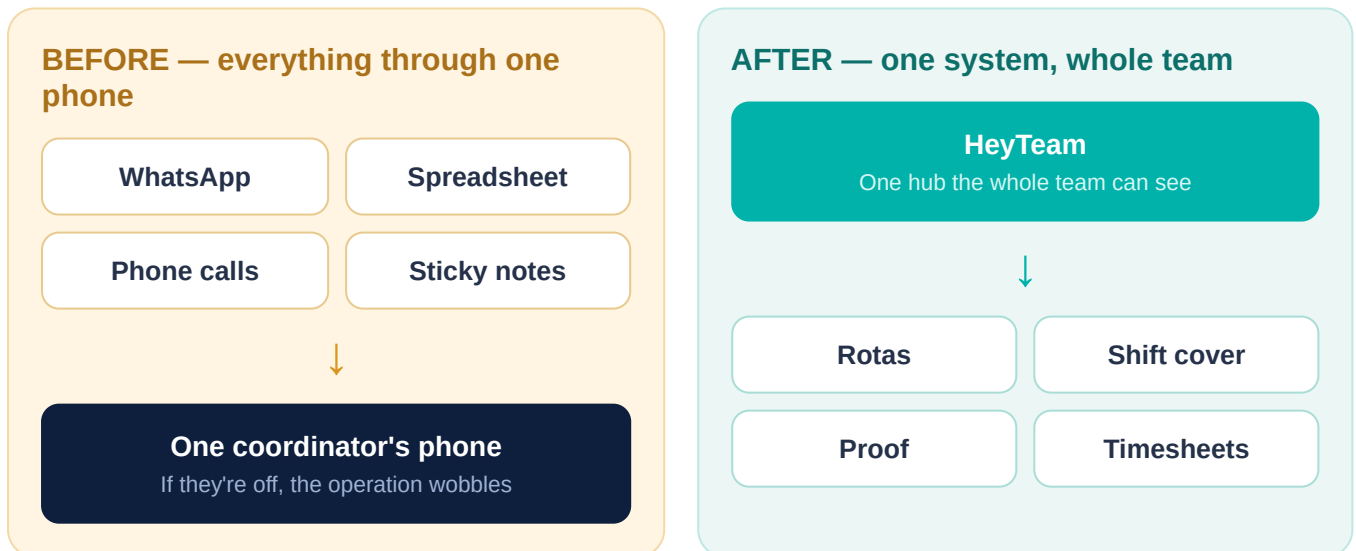
The hidden cost of running coordination on chat

- **No-shows surface too late.** You find out when the client does — not before.
- **No proof of attendance.** When a client disputes a visit, you can't show who was there or when.
- **The rota is rebuilt from scratch every week,** by hand, by one person.
- **Knowledge lives in one phone.** If your coordinator is off, the operation wobbles.
- **No audit trail.** Decisions, swaps and cover all vanish into scroll-back.

THE CORE IDEA OF THIS PLAYBOOK

You don't rip anything out on day one. You run the new system **alongside** the old one, prove it on **a single site**, then expand and retire the spreadsheet only once the new way is obviously working. Calm, reversible, and invisible to your clients.

Before → after, at a glance



• FIVE PRINCIPLES

Five principles for a calm migration

Follow these and your clients will never notice the change happened — only that the service got more reliable.

- 1 Parallel, never big-bang.**
Run HeyTeam beside your current process. Nothing gets switched off until the new way is proven.
- 2 One site first.**
Pick a single, well-run site as your pilot. Learn there before you touch the rest.
- 3 One change at a time.**
Don't move rotas, cover, proof and timesheets all at once. Staff absorb one new habit per step.
- 4 Keep WhatsApp for chat — move coordination only.**
People still like the group. Let them keep it for banter; take the operational decisions out of it.
- 5 Measure before and after.**
Capture a few baseline numbers on day one, so the improvement is a fact, not a feeling.

What moves where

Keep in WhatsApp

Informal, human, low-stakes

- Day-to-day team chat & morale
- Quick questions & heads-ups
- Photos of a job well done
- "Running 5 minutes late" notes

Move to HeyTeam

Anything a client could ask about

- Rotas & schedules
- Shift cover & no-show fill
- Proof of attendance (check-in)
- Timesheets, leave & client updates

• THE 30-DAY ROADMAP

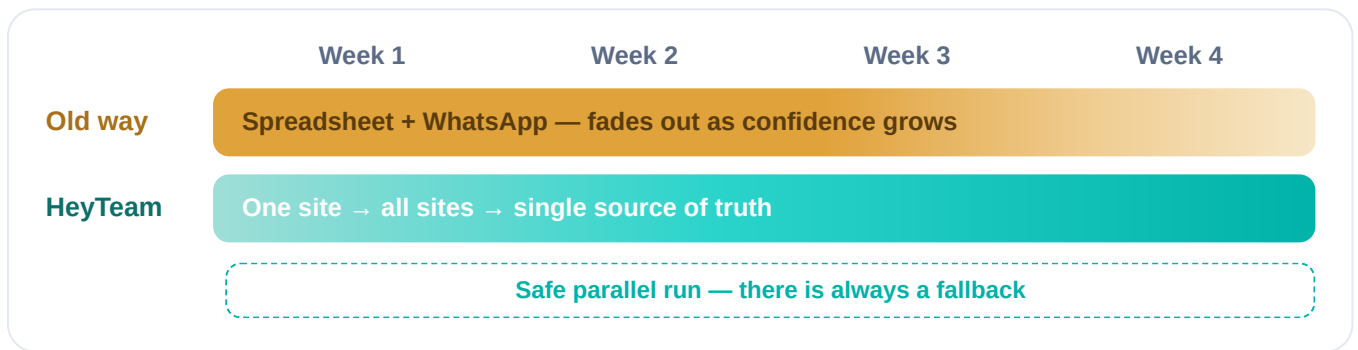
The whole plan on one page

Four weeks. Each one builds on the last. You can move faster, but never skip the parallel run.



Why the overlap keeps you safe

The old way and HeyTeam run side by side for three weeks. The old system only switches off once the new one is carrying the load — so there's always a fallback, and your clients never feel a wobble.



DAYS 1-7

Week 1 — Foundation

Objective: get HeyTeam set up, load your core data, and choose the single site you'll pilot. Nothing changes for staff yet — this week is groundwork.

Key moves

- 1 Create your account and add your sites.**
Start your free trial and enter your sites/contracts — name, address, hours. Just the structure for now.
- 2 Import your people.**
Add cleaners and supervisors with mobile numbers. This becomes your contactable pool for cover later.
- 3 Build one site's recurring rota.**
Recreate the pilot site's weekly pattern in HeyTeam so it auto-repeats — no more rebuilding each week.
- 4 Pick your pilot site & crew.**
Choose a stable, well-run site with a supervisor who's open to trying something new.
- 5 Set baseline numbers.**
Note today's figures (see page 9) so you can prove the change in four weeks.

WEEK 1 CHECKLIST

- Free trial started, account created
- All sites added
- Staff + mobile numbers imported
- Pilot site rota built & recurring
- Pilot site & supervisor chosen
- Baseline metrics recorded

⚠ WATCH OUT

Don't try to import every site and every feature at once. Week 1 is just structure plus one rota. Breadth comes later.

🗣 TELL YOUR TEAM (PILOT CREW ONLY)

"Next week we're trialling a simple app for [Site] that makes your rota and timesheets easier. Nothing changes today — I'll walk you through it before we start."

DAYS 8-14

Week 2 — Pilot one site

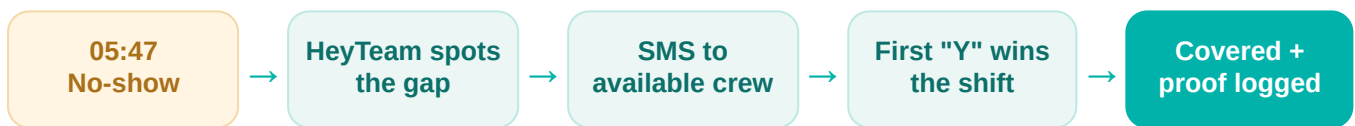
Objective: run your pilot site fully on HeyTeam, in parallel with your normal process. Prove the daily loop — schedule, check-in, cover, proof — on real jobs.

Key moves

- 1 Publish the rota through HeyTeam.**
 The pilot crew gets their shifts in the app (and by SMS for anyone without a smartphone).
- 2 Have the crew check in and out.**
 GPS check-in gives you a live view of who's on site — your first taste of real visibility.
- 3 Handle one real no-show with SMS auto-fill.**
 When a gap appears, let HeyTeam broadcast it. First person to reply "Y" takes the shift.
- 4 Capture proof of attendance.**
 Use check-in records (and Customer PIN) so you can show the client exactly who was there.
- 5 Daily 5-minute debrief.**
 A quick word with the supervisor each day. Note what's clunky and fix it before expanding.

The new way to handle 5:47am

Minutes, not a morning of phone calls — and it logs itself.



WEEK 2 CHECKLIST

- Pilot rota live in HeyTeam
- Crew checking in/out daily
- At least one cover filled by SMS
- Proof of attendance captured
- Daily debrief notes logged

⚠ WATCH OUT

Resist expanding mid-week. If something's clunky, fix it on the pilot first — a clean pilot makes the rollout effortless.

DAYS 15-21

Week 3 — Expand

Objective: roll out to every site, move all scheduling into HeyTeam, and turn off the spreadsheet rota. The app becomes how the day actually runs.

Key moves

- 1 Migrate the remaining site rotas.**
Recreate each site's recurring pattern. You've done it once — this is now quick and familiar.
- 2 Switch all cover to SMS auto-fill.**
Every no-show now goes through HeyTeam, across all sites. Stop ringing round entirely.
- 3 Turn on client proof.**
Enable Customer PIN / the client portal so customers can see attendance without calling you.
- 4 Move timesheets to auto-generated.**
Let check-in/out build timesheets automatically. Spot-check against the old method one last time.
- 5 Train your supervisors.**
A 20-minute walkthrough each. They own their sites in HeyTeam from here.

WEEK 3 CHECKLIST

- All site rotas in HeyTeam
- Spreadsheet rota switched off
- All cover via SMS auto-fill
- Client proof enabled
- Auto timesheets running
- Supervisors trained

⚠ WATCH OUT

Be explicit about the WhatsApp change. Tell everyone clearly: rotas and cover now live in HeyTeam — the group chat is for chat.

🗣 TELL YOUR TEAM (EVERYONE)

"From Monday, all rotas, shift cover and timesheets are in HeyTeam — check the app, not the chat. The WhatsApp group stays for everything else."

DAYS 22-30

Week 4 — Switch & retire

Objective: make HeyTeam the single source of truth, retire the spreadsheet for good, and lock in the new habits. Then review the wins.

Key moves

- 1 Archive the master spreadsheet.**
Make it read-only and date it. It's your safety net for a fortnight, then it's history.
- 2 Set one rule: "If it's not in HeyTeam, it didn't happen."**
No more verbal swaps or chat-only cover. The app is the record of truth.
- 3 Reduce WhatsApp to team chat.**
Operational decisions are out; camaraderie stays. Everyone knows where to look.
- 4 Review week-4 metrics vs your baseline.**
Compare against day-1 numbers (page 9). Share the improvement with the team.
- 5 Plan the next 30 days.**
New sites, tighter SLAs, building a verified cover pool — you now have the platform to scale on.

WEEK 4 CHECKLIST

- Spreadsheet archived (read-only)
- "Single source of truth" rule set
- WhatsApp = chat only
- Metrics reviewed vs baseline
- Wins shared with the team
- Next 30 days planned

✓ YOU'VE ARRIVED WHEN...

A cleaner can be off sick and the shift is covered before you've finished your coffee — automatically, with a record, and without a single phone call. That's structured coordination.

• MEASURE THE DIFFERENCE

Five numbers that prove the change

Capture these on day 1, then again on day 30. If they move like this, the migration paid for itself.

Metric	Baseline (Day 1)	Target (Day 30)
Time to fill a no-show	Often an hour+ of calls	Minutes, automatic
Shifts with proof of attendance	Few / none	Close to 100%
Hours/week building rotas	Several, by hand	Near zero (recurring)
"Did they turn up?" client calls	Regular	Rare — clients self-serve
People who can run coordination	Usually one	Any supervisor

HOW TO GRAB YOUR BASELINE IN 10 MINUTES

You don't need a study. Ask your coordinator three questions: how long did last week's worst cover take? How many shifts last week could you prove someone attended? How long did you spend on the rota? Write the answers down. That's your day-1 baseline.

What "good" looks like by week



• COPY-AND-SEND TEMPLATES

What to say to your team

Change lands better when it's framed as easier, not as surveillance. Three short messages you can adapt and send.

1 · ANNOUNCEMENT — TO THE PILOT CREW (START OF WEEK 2)

"Hi team — this week we're trying a simple app called HeyTeam for [Site]. You'll get your shifts on your phone and check in when you arrive, so timesheets sort themselves out. It should make life easier, not harder. I'll show you how in two minutes before your next shift — any questions, just ask me."

2 · GO-LIVE — TO EVERYONE (START OF WEEK 3)

"From Monday, your rota, shift cover and timesheets all live in HeyTeam — please check the app, not the group chat. If you ever can't make a shift, HeyTeam will offer it round automatically, so cover is sorted fast. The WhatsApp group stays exactly as it is for everything else."

3 · REASSURANCE — FOR ANYONE WORRIED ABOUT BEING TRACKED

"Quick note on check-in: it's there so you always get credit for the shifts you work and never get chased for a timesheet again. It records when you start and finish a job — nothing more. It protects you as much as it helps me."

TWO RULES THAT MAKE COMMS WORK

Lead with their benefit (easier rota, faster pay, no timesheet chasing), and **name one person to ask**. A new tool feels safe when there's a friendly face attached to it.

START TODAY

Run your next 30 days on HeyTeam.

Everything in this playbook works on a free trial — set up your first site, fill a real no-show by SMS, and see structured coordination for yourself. No spreadsheets harmed.

Start your free trial →

www.heyteam.ai

90 sec

to build a recurring rota

SMS Y/N

auto-fill for no-shows

Proof

of every attendance