



**LEADERS HOLDING CO.**<sup>TM</sup>

Est. 1971

## **Before the Sale, Customer Relationship Management (CRM) Thankful, Helpful**

Professional follow-up is not pushy, complicated, or hard. It is about respect and consistency.

- ✓ Respect the time the customer took to visit
- ✓ Respect the guest by communicating thoughtfully with solutions
- ✓ Consistency is about making a habit of following the same thankful and helpful follow-up with every guest

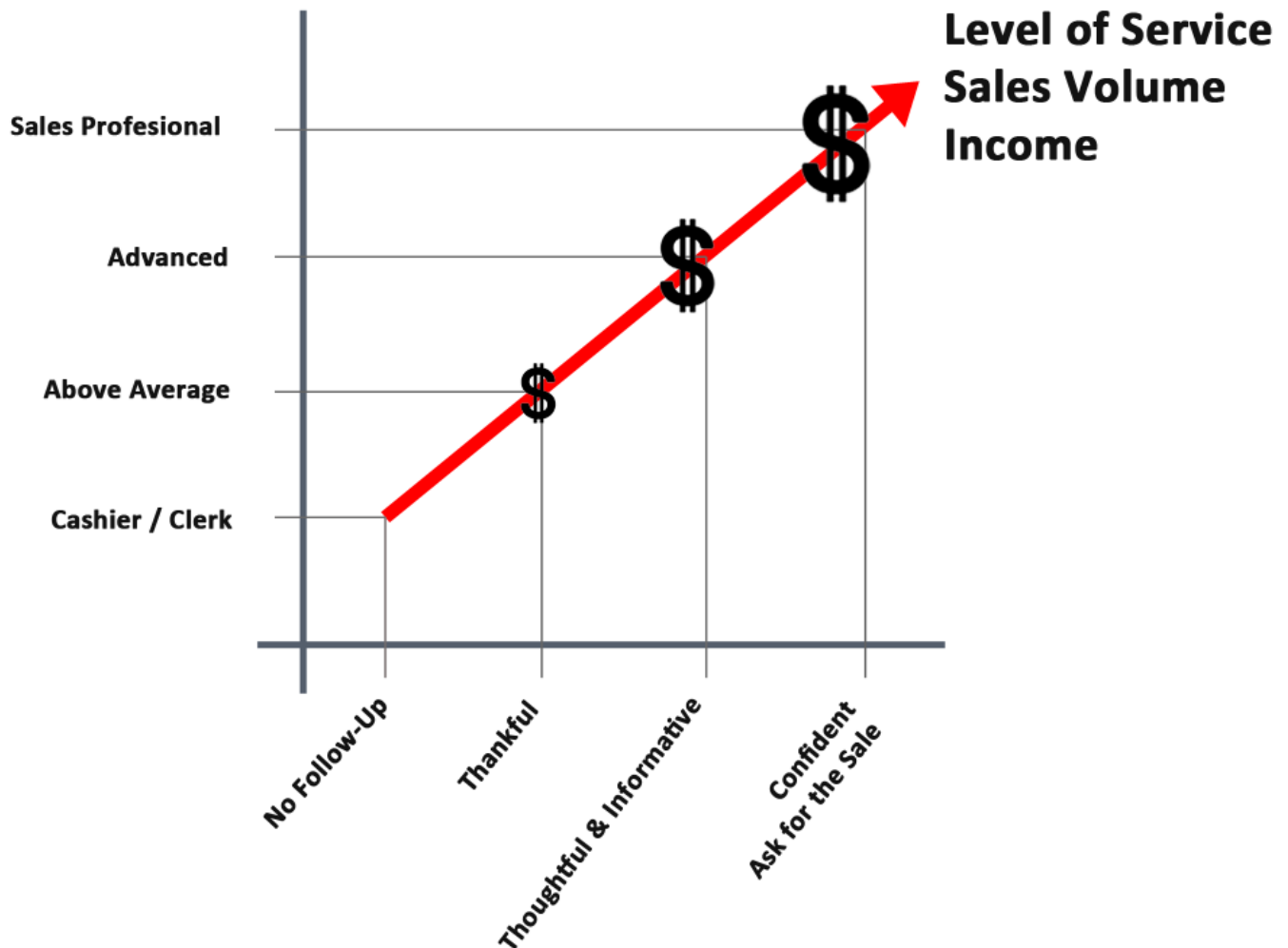
Each person who walks through the door at your team location has decided to offer their time to you to help them meet a goal. How much we respect this offer from the guest determines our level of service and success. No one likes to shop forever. People want to buy. Always provide value in your follow-up communication.

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## Stages of Success

What is the difference between a clerk and a sales professional? A clerk waits for customers in a showroom to come in and ask to buy something. A sales professional has a plan to be informative, thankful and follow up with each guest. They strive for repeat sales and referrals.



Level		Actions	
Confident	<p>If you have progressed through the previous levels in your relationship with your guest, you will have built value and trust. Once you have overcome their objections, it is now time to respect their time and confidently ask them for the sale.</p> <p>Close the sale, and take the guest out of the market.</p>	<p>Can we get this scheduled on a truck for you tomorrow? Let's put a deposit down and get it into production.</p>	Sales Professional
Thoughtful and informative	<p>Being thoughtful and informative is taking the time to learn about the guests' space and their goals and dreams for the space and taking this information to make informed recommendations, choose fabrics, and develop a layout with the room planner.</p>	<p>Sending fabric samples Creating and sharing a room planner Asking follow-up questions Overcoming challenges</p>	Advanced
Thankful	<p>The root of follow-up is being thankful of the time a guest spends in your showroom and the opportunity you received to fulfill their needs</p>		Above-average sales associate
No Follow-Up	<p>If you wait for the next guest to walk through the door and do not communicate with any opportunity unless they are in your location or call you on the phone</p>		Average - Clerk

## When Should I Follow Up

### Still looking / Have to Measure

When?	What?	How?
Within 24 Hours of Visit	Attach the quote to the "Thank You For Visiting" email template	Phone call or email template
Within 72 hours	Can I send you samples (Digitally or physically) Do you have any more questions Provide a room planner	Phone call & email
Within 5 days	Touch base	
Before 10 Days	Ask for the close	If you have answered all your questions, "would like to put a deposit down so we can get your delivery scheduled?"

### Building / Remodeling / Moving

When?	What?	How?
Within 24 Hours of Visit	Attach the quote to the "Thank You For Visiting" email template	Phone call or Email
Within 72 hours	Can I send you samples (Digitally or physically) Do you have any more questions Provide a room planner	Phone call & Email
Within ? days	Based on the project timeline, set the Next Activity Date on the Sales Order and or create a NetSuite task to remind you to follow up with the guest.	Phone call & Email

## Email Templates

Email templates are foundational documents for customer communication after a guest visits and before the sale. Team members are welcome to edit templates to best fit their interactions with a guest or use the templates as talking points for a phone call with a guest.

Visit 3.18 Customer Communication to learn how send an email template.

Step	Theme	When?	What?
Step 1	Thank you!	During visit	Thank you for visiting. Provide a copy of quote and visit notes.
Step 2	Can I help?	Within 48 hours	Let me know if I can help further.
Step 3	Thinking about you...	Within 5 days	We were thinking about you
Step 4	Time is Running Out. Do you want me to extend?	Before 10 Days	Time is running out. Price may change
Step 5	Quote Closed	10 Days if not extended 15 Days if extended	The quote automatically closes in 10 days unless the 5 day extension is activated. Quotes close to prevent pricing errors.
Step 6	We are Here to Help	Periodically	Check-in on the guest to see if their project is still active



## 1 Thank You For The Opportunity – Attach the Quote

**Subject:** Leaders: Thank you for the opportunity



*Thank you*

**\${customer.firstname}\${customer.companyname}, we appreciate your time today and are excited to help you create a great space. Please let us know if we can help in any way.**

**We Can:**

- Provide you with fabric and finish swatches
- Create quotes
- Provide images
- Create and furnish the space in a room planner
- Provide easy care and maintenance instructions for items you are interested in
- Answer any questions you have

Leaders is Florida family-owned and operated since 1971. We look forward to earning your business,

**\${preferences.message\_signature}**

**Referrals are the ultimate compliment one can give. We appreciate you passing along our name to anyone who would benefit from our service.**



## 2 Just Checking In - Done

**Subject:** Leaders: Just Checking In



**\${customer.firstname}\${customer.companyname}, we are just checking in.**

We look forward to helping you create a great space. Please let us know if we can help in any way.

We can:

- Send you finish or fabric samples
- Create a scale room planner
- Answer any questions
- Offer design assistance

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**\${preferences.message\_signature}**

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## 2 Can We Help Further? – Done

**Subject:** Leaders: Can we help?

**Can we help further?**



**{{customer.firstname}}{{customer.companyname}},**

Thank you for giving us the opportunity to create a beautiful space. I am standing by and ready to help.

We can:

- Answer any questions you have
- Send you finish or fabric samples
- Create a scale room planner for you
- Offer design assistance to you
- Send you care and maintenance packages
- Set a one-on-one appointment with you

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{{preferences.message\_signature}}

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## 2 Send/Email Information from Store Visit

**Subject: Leaders:** Additional Information?



**\${customer.firstname}\${customer.companyname},**

Here is a review of the items, finish, and fabrics we looked at together on your last visit. We have finish and fabric samples of most items. Please let me know which ones you would like me to mail to you.

**Cut and paste to insert images of items from the guests' quote**



Please let me know if I can help with revisions or answer any questions.

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**\${preferences.message\_signature}**

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## 2 Send/Email Fabric Samples

**Subject:** Leaders: Need Samples?



**\${customer.firstname}\${customer.companyname},**

We have finish and fabric samples of most items. Please let me know which ones you would like me to mail to you by calling or responding to this email.

I am standing by to help make your space a reality.

Cut and paste to insert images of finish and fabrics the guest liked from their visit.



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### 3 Send/Email Pertinent Ownership Information – Attach Ownership Packet

**Subject:** Leaders: Ownership Information



**\${customer.firstname}\${customer.companyname},**

Thank you for giving us the opportunity to create a beautiful space for you. It's been a few days and we wanted to ensure you have everything you need to help make an informed decision. I have attached the care and maintenance packet for the items you are considering.

We hope this helps and I am happy to answer any additional questions.

Leaders is Florida family-owned and operated since 1971. We look forward to earning your business,

**\${preferences.message\_signature}**

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### 3 Offer Financing Information (Apply from home) - Done

**Subject:** Leaders: One year or MORE, same as cash



**\${customer.firstname}\${customer.companyname}, Can we help further?**

Thank you for the opportunity to create a beautiful space for you. We offer convenient financing options for your purchase through Wells Fargo. The two plan options are:

- Financed purchases over \$500-no interest if paid within 12 months of regular equal payments
- Financed purchases over \$5,000-no interest if paid within 36 months of regular equal monthly payments

#### **Quick and Easy**

While using your cell phone, scan the QR Code or [Click Here](#) to apply.



1. Open your camera  
*(no additional app download required)*
2. Scan the code above
3. Select the link and begin credit application

Powered by Wells Fargo

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### 3 Make an Appointment - Done

**Subject:** Leaders: Design Appointment?



**\${customer.firstname}\${customer.companyname},**

Thank you for allowing me to help you create a beautiful space. The decisions can be overwhelming, and I am here to help. I am happy to schedule a one-on-one appointment in-person or by phone.

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**\${preferences.message\_signature}**

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### 3 Why choose Leaders? - Done

**Subject:** Leaders: Serving Florida Since 1971

**\${customer.firstname}\${customer.companyname},**

Thank you for allowing us to create a beautiful space for you. Leaders has been the premier outdoor furniture resource for the state of Florida since 1971! Nobody knows Florida better.

	<b>More choices than any other outdoor store</b>
	<b>Fastest custom orders Fast delivery</b>
	<b>We sell only products designed for Florida's harsh tropical climate.</b>
	<b>\$25,000,000 in stock and ready to deliver.</b>
	<b>We don't use third parties. Leaders' team members inspect, load, and deliver your purchase on our trucks. Our Solutions Team is ready to work with you on any concern.</b>

We look forward to earning your business.



**\${preferences.message\_signature}**

**Referrals are the ultimate compliment one can give. We appreciate you passing along our name to anyone who would benefit from our service.**



#### 4 We can order over the phone - Done

**Subject:** Leaders: We Can Make it Easy, Order by Phone?



**\${customer.firstname}\${customer.companyname},**

We know life can get busy, and we want to do our best to make it easy for you. We can take your order over the phone. Reply to this email, and I will call you or we are available to you Monday through Saturday, 10 am – 7 pm, and on Sunday 10 am – 6 pm for you to call us.

We look forward to earning your business.

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#### 4 Offer 5-day extension - Done

**Subject:** Leaders: Need more time?

## Need more time?



**\${customer.firstname}\${customer.companyname},**

The quote we provided expires ten days from the date it was written. If you need additional time, we can do a one-time 5-day extension. Please let me know if this interests you.

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**\${preferences.message\_signature}**

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