



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

Est. 1971

## **Customer Relationship Management, CRM, Review**

1. Our sales team members are one of Leader's competitive advantages.
  - a. True
  - b. False
2. Which of the following help to build a relationship with our guests?
  - a. We listen to what they have to say about their space and how they want to furnish it.
  - b. We have a room planner to help make the design and decision process simple.
  - c. We have a large selection of products that we can offer information and details about.
  - d. We have free fabric samples to help customers feel confident in their choices.
  - e. We have you to make them feel comfortable in our stores and happy about their selection.
  - f. All of the above
3. Which of the following tools help us develop and maintain a relationship with our guests?
  - a. Ballot box entries to develop a contact record with new guests.
  - b. Thank you notes to send to visitors or buyers. Write and mail as soon as possible.
  - c. Email templates for you to use to send digital messages
  - d. Prior customer lists for many years that have addresses and phone numbers
  - e. A follow up Prospect file on Google Chrome that allows you to make and search records quickly and view from anywhere
  - f. All of the above
4. You can find your own Prospect page at Google Chrome/Apps/Sheets.
  - a. True
  - b. False
5. You can research your Prospect page by using filters for which of the below choices?
  - a. Name by A-Z and Z-A
  - b. What items or collections the guest liked
  - c. What note you made that will remind you about the guest
  - d. City
  - e. Street address
  - f. Zip code
  - g. Email address
  - h. Phone number
  - i. Date
  - j. If you wrote a quote
  - k. All of the above
6. You don't need a personal assistant to help you look through years of pages, you have Google sheets.
  - a. True
  - b. False

7. The more prospects we develop the more sales we create.
  - a. True
  - b. False
8. List 3 reasons to send a thank you or note card.
  - a.
  - b.
  - c.
9. To receive bonus we must send cards to at least 70% of our purchasers or visitors.
  - a. True
  - b. False
10. When is the best time to send a card?
  - a. Immediately
  - b. In a week or two
  - c. After delivery

**Sales Associate Name:** \_\_\_\_\_

**Employee ID#:** \_\_\_\_\_ **Date:** \_\_\_\_\_