Stages of a Customer
CRM Pipeline

From the first visit to a customer purchase

NetSuite offers very robust tools to manage the relationship of your guests from their first visit all the way through paying for a purchase. This adds a little complexity from what you may be used to, but the end result is a better experience for guests and more sales for you. Please take the time to study and learn these terms and concepts to ensure you get the most from NetSuite

Important: In NetSuite you can open screens in View or Edit mode. It is important because all the pages act differently in either mode. They do just what they say. In View mode you can only look at a saved record. Because the record is not open for editing you will have other options to move forward. Moving forward could be progressing from a quote to a sales order. In Edit mode you can open the record to edit and make changes. If you are changing the quote in Edit mode the button to turn it into a sales order will not be there until you save the changes you made while in Edit mode.

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Terms to Learn:

Knowing what the following terms mean and how they work together is critical to giving customers the best experience and closing sales.

Guest A Guest is a precursor to a Customer record. A Guest is a person who has visited your showroom and expressed some interest but has not bought yet. They are not ready to share a great deal of information with you. They may have filled out a $100 give-a-way. This allows you to populate the potential for follow up with limited required information. Although there are a lot of useful fields only the fields listed in red are required to begin documenting your relationship with the Guest. A Guest record will turn into a Customer record once a Guest has placed an order.

You will have many guest records

- ✓ Primary Information Tab
  - Customer Type
  - Name
  - Phone number
  - Communication Preference
  - How did the guest hear about Leader's
- ✓ Address Tab
  - Delivery Address
  - Billing Address
- ✓ Sales Tab
  - Expected close date
  - Projected Total
  - Details of customer's interest
  - Why they are buying

Opportunity An Opportunity is a more detailed record of a Guest. It starts to outline the Guest's specific interests. Opportunities in NetSuite will replace your paper follow up log. The more accurately you use Opportunities the better you will be able to follow up with Guests and the more your sales will be protected. Procedure 2.300 Whose Sale Is It is based on accurately logging your Opportunities. You cannot have an Opportunity without creating a Guest record or linking them to an existing customer. A Guest or customer can have multiple Opportunities. When Guest's specific interests are logged accurately it will give you the ability to use powerful tools in NetSuite to follow up in the most effective way, creating more sales, creating more income for you. Although there are a lot of useful fields only the fields listed in red are required to begin documenting your relationship with the guest.

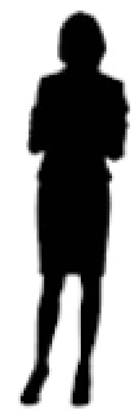
- ✓ Some Guests will turn into opportunities
- ✓ Primary Information Tab
  - Project Name
  - Customer Name
    - Note you can use the + button to the right of the record to create a new guest from the opportunity page
  - Sales Rep
  - Expected Close Date
  - Opportunity Status
  - Opportunity Probability
- ✓ Opportunity Notes
  - Area
  - Comments
  - Projected total of the opportunity
  - Reminder Notes
- ✓ Items Tab
  - Specific stock and special-order products. Your efforts entering the product here will translate all the way to the sales order. You will not have to enter the information twice. You can edit what you entered later.
- ✓ Sales Tab
  - Create or mark a quote associated with the opportunity
- ✓ Qualifications Tab
  - Estimated Budget
  - Sales Readiness
  - Buying Time Frame
  - Buying Reason
- ✓ Closed Transactions
  - Sales statistics on how many quotes were sold from the opportunity

Quote A customer that is at Quote stage is very close to buying. Quotes can be made for Guests or for existing customer records. A Quote is a detailed outline of a potential transaction. The only thing left would be final confirmation from the customer and a deposit. Quotes will not need to be re-entered in the system and can be easily turned into a sales order. Quotes do not reserve inventory.

- ✓ Primary Information Tab
  - Update the sales rep number
  - Split the sale and add a second sales rep
  - Status
- ✓ Items Tab
  - Add or edit line items of product
- ✓ Shipping Tab
  - Select the delivery method
- ✓ Communications Tab
  - Select an automatic message to be added to quotes that are sent
  - View communication history between the guest and leaders

Sales Order A guest that has a Sales Order turns into a Customer. A Sales Order is a record of what a Guest would like to order that creates firm product reservations against our inventory. Once a Sales Order is saved it reserves stock merchandise or flags the purchasing department to order merchandise that is needed to fulfill the order. The product lines on saved Sales Orders can be edited till close of business the day they are written. The following fields must be completed to finalize and save a Sales Order.

- ✓ Sales Information Tab
  - Update the sales rep number
  - Split the sale and add a second sales rep
- ✓ 1. Item Tab
  - Add or edit line items of product
- ✓ 2. Shipping/Billing
  - Enter a new or select an existing delivery address
  - Select a deliver method
  - Enter a new or select a billing address
- ✓ 3. Customer Signature
  - Capture the guests signature digitally by them typing their initials or using the mouse



Invoice An Invoice is a record showing the final balance on products that are fulfilled. Leaders policy is to collect the balance before delivery. Invoices should always show a zero balance unless the invoice will be paid with an approved finance application.

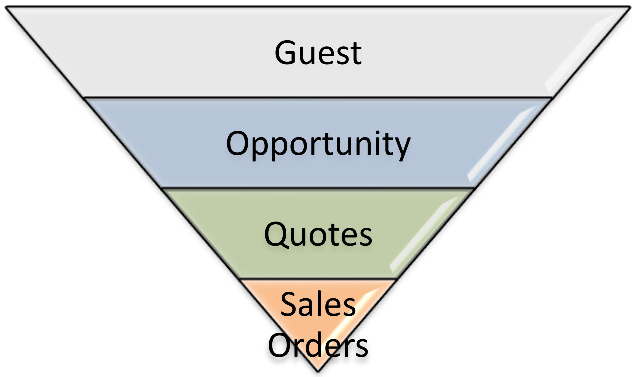
Summary

	What?	Required	Why?
Guest	A guest is someone who has visited your showroom. They are not ready to buy but you started to build a relationship with them. You know their name and their general interests. You may use the $100 give a way to earn more specifics to add to their record.	Customer Type Name Communication Preference	Basic record that requires minimal information that you can follow up on at a later date.
Opportunity	An opportunity is a guest who is getting serious about buying. You have worked with them on products, have an idea of the size of the space available to furnish, you have an idea of what the project will cost, you know when the customer would like it by, and why they didn't buy today. You may not know all the products they want so you did not put it into a quote. You can enter products on an opportunity.	Guest or Customer Record	One step above a Guest record. Require minimal information but you can add more specifics to the record. An opportunity can be converted to a sales order.
Quote	A quote is just like a sales order where you put specific items on a sales order but a quote does not reserve the items or bill the customer. When a quote is emailed or printed it will not have brand or product specific information on it but it will have the items, a brief description and the costs associated with them. Quotes do not reserve merchandise	Guest or Customer Record	Specific products a guest or customer would like to order that can be easily converted into a sales order.
Sales Order / Customer	Sales Orders turn opportunities and quotes from conversations to hard sales that reserve merchandise and create action. Sales Orders can be edited. A customer is just that, a person that has a full customer record in the system and has bought from us in the past. To save a customer record the required fields must be complete.	Customer Type Name Email Phone Number Preferred communication method How did they hear about us	A record of people who have bought from Leader's
Invoice	An Invoice is a record that solidifies what part of a Sales Order has been fulfilled. It defines the value of products delivered and the payments put toward those products. If a sales order is paid in full before it is fulfilled the amount owed should be zero.		Invoicing must happen to take deposits associated with an order and apply them to it. Invoicing is the record that tracks the value of payments vs the value of product fulfilled in a transaction.

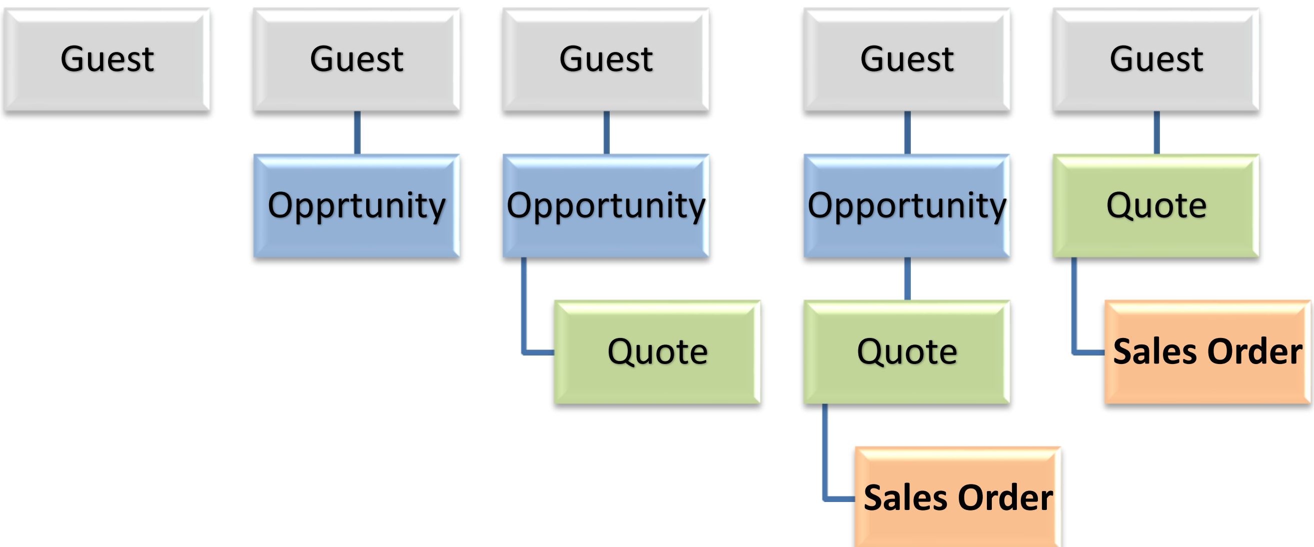
"Just Visiting" to a Sale

Now that we have base understanding of the terms let's look at how they fit together. Think of it as a funnel. You should have many Guests, some of those Guests move to Opportunities, Opportunities that become very serious about buying become Quotes and ultimately a customer buys product with a Sales Order.

Funnel Diagram



Path Diagrams



Reporting can be run against the selling process to follow up with opportunities and quotes to move them along to a sales order.