



Refresh Your Space Create Lifelong Clients

Leaders makes the cushions for most of the items we sell. No other furniture provider can offer replacement cushions like Leaders can. We have been creating digital patterns since 1994. Being able to offer replacement cushions for life helps you create lifelong clients from what would otherwise be a one-time customer.

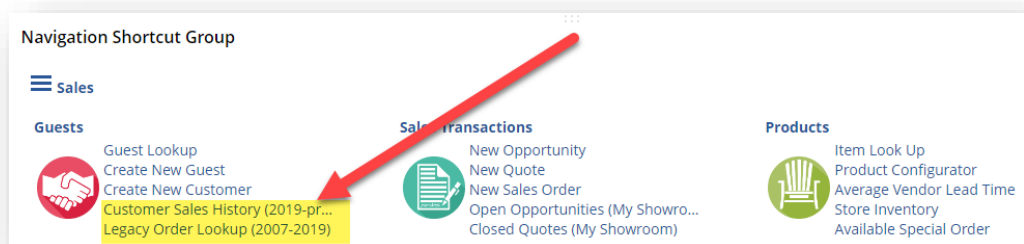
Thankful, Helpful, Meaningful Guest Communication

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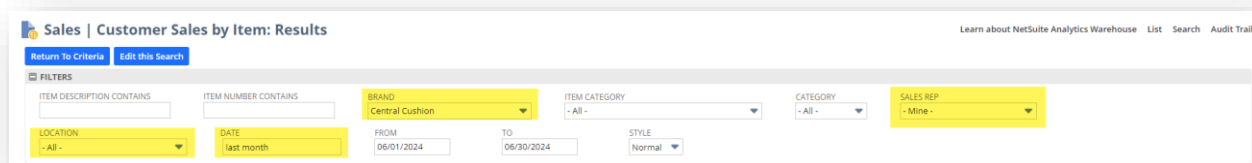
Finding the data

Finding the prospect list is simple. There are two reports available on the Navigation Shortcut Group on the home screen.



Customer Sales History (2019 – Present)

Customer Sales History searches all the guests who have purchased since we went live on NetSuite in 2019. Customer records will already exist for all the guests you find in this search. Any communication sent out of NetSuite will automatically log in to the communications tab of the Customer Record.




Set your filters:

- ✓ Brand
 - Central Cushion or PerfectFit
- ✓ Location
 - Set to your location
- ✓ Date
 - Select the date range you wish to prospect
- ✓ Sales Rep

| Setting | What? |
|------------------------|---|
| Mine | Only sales order you have written |
| My Team | Only sales order written by team members assigned to you |
| Mine and Unassigned | Only sales orders written by you and any sales orders without a salesperson assigned to them. |
| My Team and Unassigned | Only sales order written by team members assigned to you and any sales orders without a salesperson assigned to them. |
| Individuals Name | Only sales orders written by the specific individual |

Creating a Prospect List for Your Team

You can create a prospect list for your team by printing the report.

1. Execute a search.
2. Click the  icon
 - a. The file will appear in your downloads
3. Have your team to work and check off the guests they have contacted.

Legacy Order Lookup (2007 – 2019)

Legacy Order Lookup is harder to use than Customer Sales History. It does not allow you to search by Brand or Date. Legacy Order Look up is a gold mine of data if you put the extra work into it.



1. Click on each guest
2. Find orders for Central Cushions or Perfect Fit
3. Create a Customer Record If you cannot find one
 - a. If you cannot find a customer record, create a new one.
 - i. If there is no customer record, you will not have an email address. You will have to send a printed copy of the email and quote through traditional mail
4. Create and send the quote with the Replacement Cushion email template
 - a. This will protect your effort under the “Who’s Sale Is It” policy
5. Any communication sent out of NetSuite will automatically log in to the communications tab of the Customer Record.
6. Follow 3.19 Before the Sale Guest Relationship Management

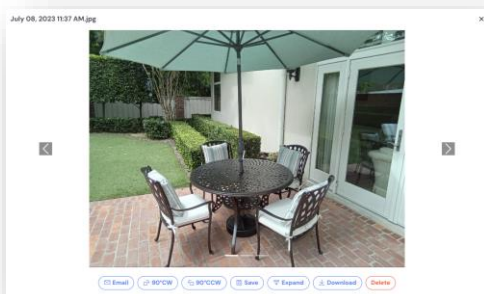
Creating and Sending a Quote

Find Photos

1. Find a photo from the original day of delivery or of the home to insert in the email you are going to send

Nothing makes a guest stop and look at what you sent them like a picture of their home.

| | What? | Why? | Where? |
|------|---|--|--|
| Best |  | Find a picture of the original delivery to insert in the email | R:\6 About Delivery, Shipping and Transfers\6.15 DispatchTrack |
| Good |  | Find a picture of their home or space from a real estate listing to catch their attention. | https://www.zillow.com/ |



2. Review the images you found and the guest's order history. Write a thoughtful quote based on the information you have gathered. Can you include all the categories for a home run? Don't be nervous. People like it when things are easy. People like thankful, helpful, meaningful communication. People like to be served.
 - a. Replacement Cushions
 - i. Central Cushion & PerfectFit
 - b. Toss Pillows
 - c. Floor Coverings
 - d. Wall Hangings
 - e. Shade
 - f. Tabletop Accessories
 - g. Add on items to the collection
 - h. Protection Plus Accident Forgiveness

Send a Quote

From the quote, send an email to the guest.

- ✓ Template Category: Retail CRM
 - Template CRM | Refresh Your Space
- ✓ Do not forget to paste in the pictures you found for the best results
- ✓ Feel free to edit and personalize the email template or write your own email entirely