



## After the Sale CRM

Meaningful communication with the guest after the sale will create long term loyal clients ensuring you have a successful and lucrative career.

There is little competition in consistent effort. Consistency beats talent, luck, and good intentions every time.

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The following email templates must be typed into Outlook. You cannot cut and past from a pdf. We recommend using Outlook over NetSuite. In Outlook you can easily attach pictures. These templates are just a starting point. As you practice and the follow up becomes habit feel free to write your own professional messages.

## Sale

Reason	When	Why	How
Sale on items they didn't buy	During the promotion period	People love to save money. Your guest may have not purchased because of price. If they know they are going to save they are going to be happy you reached out and appreciate you thinking of them	Early on in the sale, you can mail. Follow up with a call before the sale ends
Sale from a vendor they bought	During the sale period	This will encourage a customer to add on, get an item they missed the first time, or maybe even buy for another property	Early on in the sale you can mail. Follow up with a call before the sale ends
Flash Promotion	As soon as you know	People love to save money and they will appreciate you for telling them how.	Call.

Copy and paste images of sale items for a strong impact.

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**Subject Line:** Leaders: On Sales Now

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**Email Body:**

# SALE

— LIMITED TIME —

{{customer.firstName}} {{customer.companyname}},

I wanted to share this with you so you did not miss out on an opportunity to save money. Leaders is having a sale on items you were interested in when you visited. Please contact me today if I can help. We are looking forward to hearing from you.



{{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.



## Closeouts

Reason	When	Why	How
Closeout Product	For the most inventory, soon after the closeout is announced	If they were thinking about adding to their collection, this is the time. No one wants to come in to find out what they have been planning for is no longer available.	Soon after the closeout is announced Email. Follow up with a call before the sale ends.

Copy and paste images of sale items for a strong impact.

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**Subject Line:** Leaders: Clearance Sale

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**Email Body:**



\${customer.firstName}}\${customer.companyname},

We wanted to let you know that your collection is on closeout. If you were thinking of adding any items now is the time.

\${preferences.message\_signature}

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## Delivery Follow Up

Reason	When	Why	How
Review Driver Images/Add-On	At least once per week	With the Dispatch Track system delivery drivers are asked to take pictures of the deliveries they make. By viewing these you will be able to see how the products you sold look set up in the customer's home. Not only will this give you good things to talk about with the guest you will be able to make suggestions on add on products; chaise lounges, rugs, pillows, lighting, art and accessories, etc.	Email templated, post card or phone call. Be sure to know the price of the suggested items when you communicate with the customer.
Satisfaction	After each customer delivery	Call to check on your customers after each delivery. Ask if there is anything we can help with and follow up with suggested add-on's	Phone Call. Be sure to know the price of the suggested items when you communicate with the customer.
Thank You	After each customer delivery	Send a post card with a thank you note to let the customer know that we appreciate them	Post card - R:\3 About Customers and Orders\3.16 Thank you cards

Copy and paste images from Dispatch Track from the guests previous delivery stops and of the items you are suggesting to make a visually rich presentation.

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**Subject Line:** Leaders: Wow! It is looking great.

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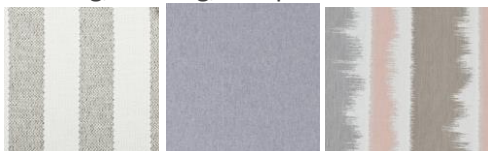
**Email Body:**

`\${customer.firstName}}`\${customer.companyname}},

I just reviewed the pictures from the delivery team. It looks beautiful!

I have some ideas to take the space to the next level:

Throw pillows would had a pop of color. I have a combination of three fabrics picked out that will match your area rug, flooring, and paint.



The Maui / Retreat Console table would go great against the wall



We have some hand crafted table top accessories that will bring texture to the space. Here are a few examples.



Let me know if I can help.

\$\_{preferences.message\_signature}

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## Ownership Experience

### Care and maintenance

Reason	When	Why	How
Care and Maintenance Products	Periodically every year	If we encourage a guest to take care of their purchase, they will have a better ownership experience. Selling care and maintenance products helps you create a long-term client.	Email template or post card when you have time. Run the previous customer report for a time period and work your way through it. Be sure to know the price of what you are offering and let the guest know in your communication.

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**Subject Line:** Leaders: Happy Birthday to Your Patio

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\${customer.firstName}}\${customer.companyname},

Can you believe it has been a year already? We are just checking in to make sure everything is going great and to remind you how easy your furniture is to clean. Dish soap, water, and even mix in bleach if you would like. Brush with a soft bristle brush and rinse. Don't forget to protect wicker and poly with Meguiar's and aluminum with corrosion block at least twice a year.

Please let us know if we can help with anything!

\${preferences.message\_signature}

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## Pollen Season

Reason	When	Why	How
Before pollen & leaf season	January, February, October	It is much easier and cheaper for a guest to cover their outdoor purchase than let it get filthy and have to spend the time and money to clean it. They will appreciate you thinking of them.	Email templated, post card or phone. Phone is less work and you will close more sales. Be sure to know the price of covers the customer needs and let the guest know in your communication

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**Subject Line:** Leaders: Prepare for Pollen Season

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**Email Body:**



\${customer.firstName}}\${customer.companyname},

We hope you had a great winter season. We wanted to remind you that pollen season is just around the corner. Protect your investment with covers and save a lot of cleaning.



Attached is a quote for the covers that fit your items. Let me know if I can help.

\${preferences.message\_signature}

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## Annual “How can we help?”

Reason	When	Why	How
Periodically every year after ownership	At least once per year per customer	There is no better way to make sure you are the go to person for your guests than following up with them at least once per year.	Email templated, post card or phone call. Ask them if we can help in anyway with their previous purchase. Suggest care and maintenance, covers, and let them know we offer replacement cushions for any of our in house brands. Be sure to know the price of the suggested items when you communicate with the customer.

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**Subject Line:** Leaders: Happy Birthday to Your Patio

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**Email Body:**

`\${customer.firstName}}`\${customer.companyname},

We are here to help. Please let us know if you have any projects we can help you work on. We can:

- ✓ Provide FREE fabric samples
- ✓ Provide FREE finish samples
- ✓ Create a digital room planner
- ✓ Ship anywhere

We are standing by to make your next outdoor living project fast, affordable, and easy.

`\${preferences.message\_signature}`

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## "Your Premium Delivery Is About to Expire

Reason	When	Why	How
To save the guest delivery expense on a new order	Before the 12-month expiration of their one year premium delivery plan.	Everyone loves to save money. This is an opportunity to offer delivery for no additional cost.	Email templated, post card or phone call. Ask them if we can help in any way with their previous purchase. Suggest care and maintenance, covers, and let them know we offer replacement cushions for any of our in house brands. Be sure to know the price of the suggested items when you communicate with the customer.

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**Subject Line:** Leaders: Your Premium Delivery is About To Expire

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**Subject:**

### PREMIUM DELIVERY EXPIRING

{{customer.firstName}} {{customer.companyname}},

We wanted to let you know premium delivery subscription is about to expire so you do not miss out on the opportunity. If you have anything you want to add to your collection we can deliver it for free until **date/date/date**.

Let me know if I can help.

{{preferences.message\_signature}}

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