

Final Presentation

THE COMPANY

SCIENCE OF SALES

SPRING 2025

Confidentiality Notice:

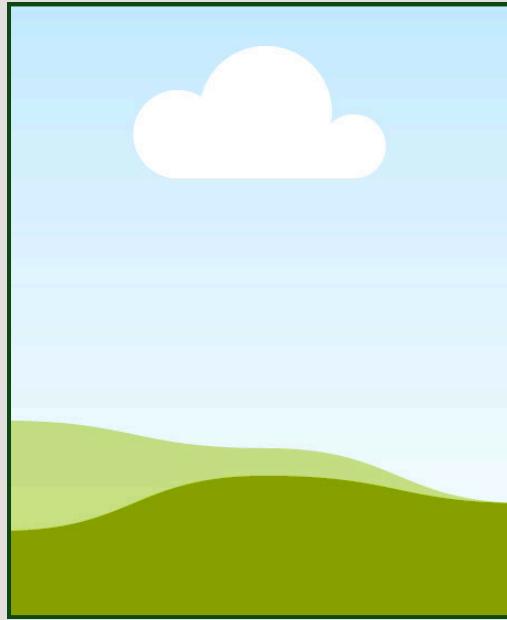
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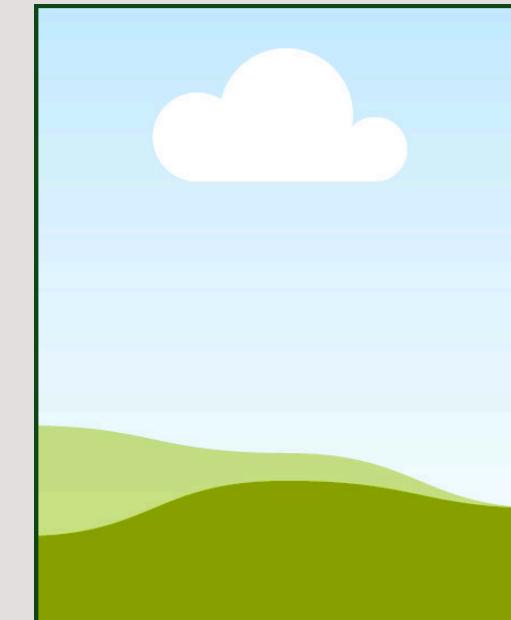
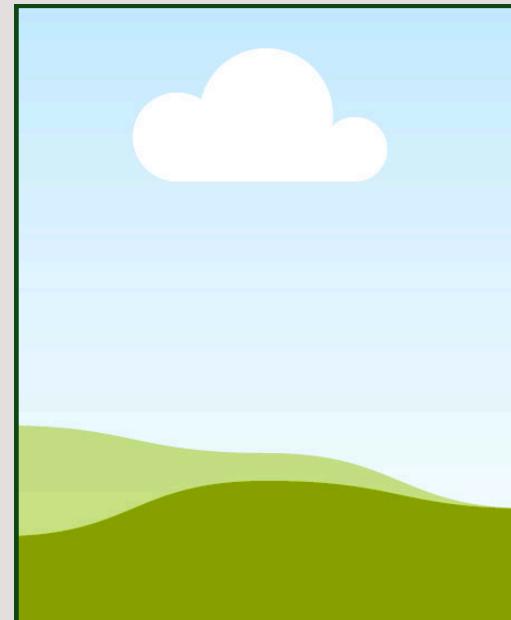
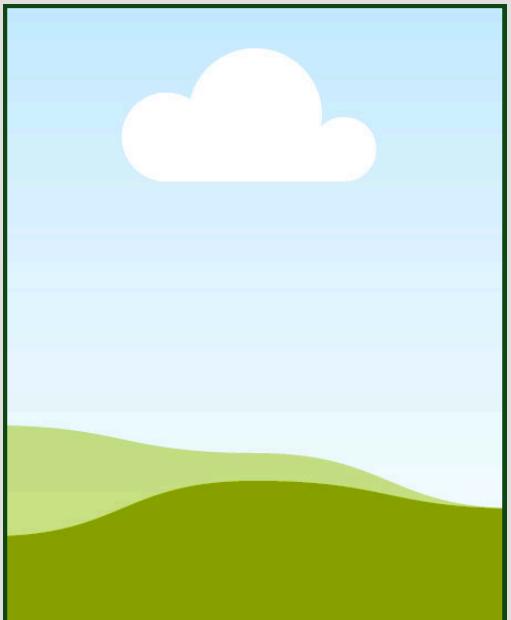
Agenda

- Timeline
- Introduction to Cabot House
- Objective & Deliverables
- Buyer Persona
- Primary Research Recap
- Sales Philosophy
- B2C Sales Process
- B2B Sales Process
- Metrics
- Sales Funnel
- Example Mix
- CRM
- Additional Recommendations

OUR TEAM



Ezey Duru
Co-captain



Our Timeline

Timeline: Research Phase

January



Weeks 1-2

Discovery Meeting
Starting Research



Weeks 3-4

Interviews
Reading Current
Guide



February



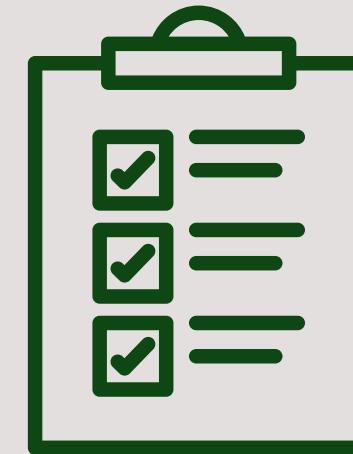
Weeks 5-6

Interviews
Midterm
Refine Metrics



Week 7

Complete
interviews
Outline Playbook
and deliverables



Timeline: Writing Phase

March



Weeks 8-9

Share Sales
Playbook Outline
and Slides with
CEO



Weeks 10-11

Write Playbook
Complete Slides



April



Week 12

Case Study
Refine Slides and
Playbook



Week 13

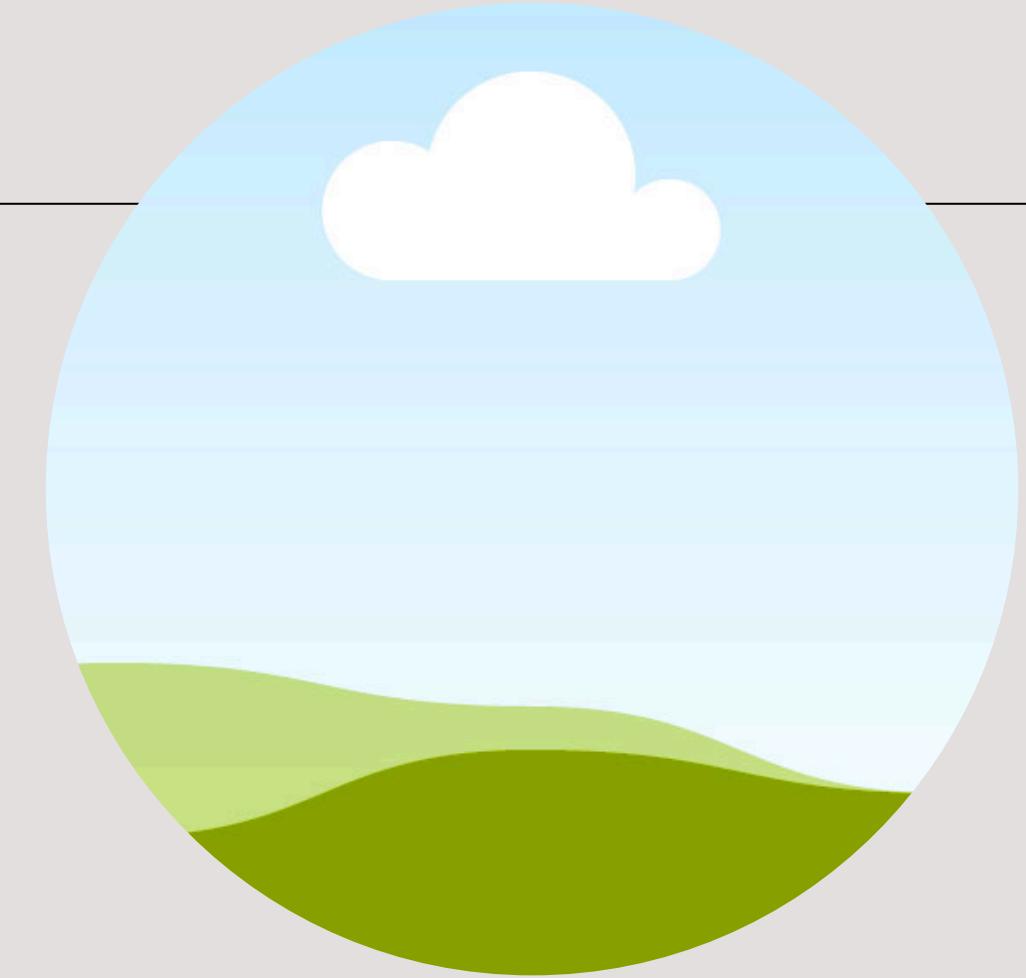
Film Videos
Final Presentation



Introduction to The Company

Who ithe Company

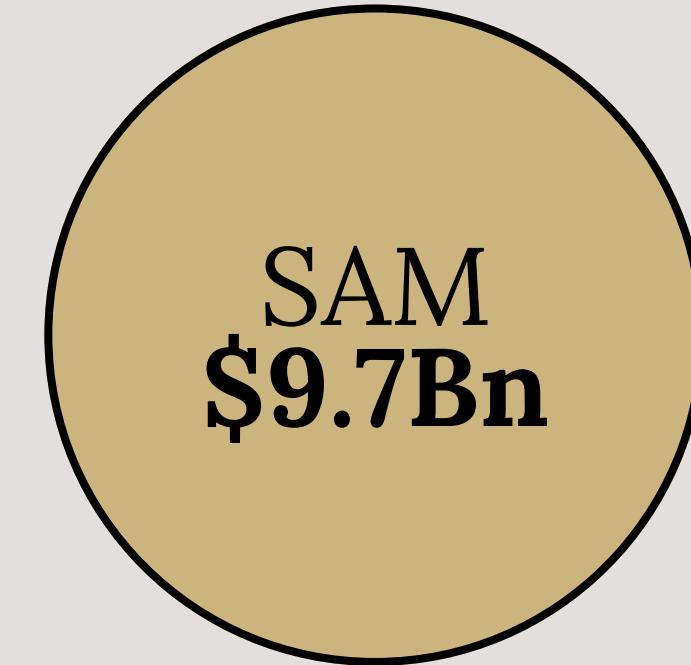
- Luxury, family-owned company
 - Transforming houses into timeless, beautiful homes.
- Personalized experience
 - Every client feels seen, heard, and supported.
- Custom, high-quality furnishings
 - Reflect each client's unique lifestyle.
- Expert designers
 - Offering a seamless, curated shopping experience.
- Collaborative approach
 - Builds lasting relationships with our clients.



Market Sizing



Total US
Furniture Market



Luxury Furniture
Market



The Company
Potential Share

Target Market Characteristics

Affluent Homeowners (50+)

Heirloom-quality, in-home guidance; driven by exclusivity and long-term value.

Young Professionals (30-45)

Modern, budget-friendly pieces; motivated by financing and social-media appeal.

Interior Designers & Architects

Curated, customizable selections with reliable lead times; value trade pricing.

Developers & Commercial Clients

Bulk, durable orders on strict schedules; seek negotiated contracts & white-glove logistics.

Competitor Overview

Large National Retailers

- Broad national footprint & in-house design services
- Accessible price points; less focus on exclusive lines

Artisanal Lifestyle Brands

- Sustainable, artisanal collections; strong e-commerce
- Limited trade-only pricing and B2B customization

Local and Regional Boutiques

- Local boutique with personalized service
- Smaller vendor network; fewer exclusive offerings

Ultra-Luxury Lifestyle Brands

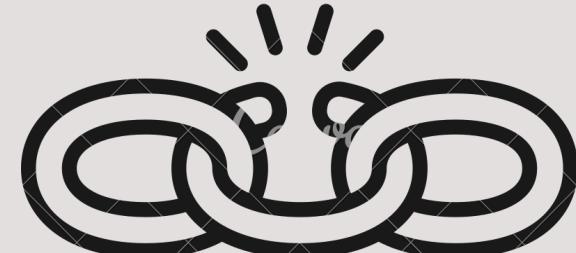
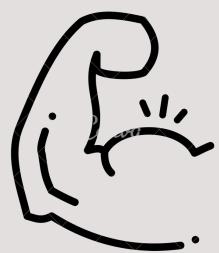
- Ultra-luxury lifestyle brand; immersive showrooms
- High price barrier; less flexible on customization

Discovery

- Pain Points
 - Inconsistent sales process
 - Long, complicated sales cycle
 - Design and sales roles conflict
 - Lack of structures post-sale engagement
 - Difficulty adopting to Storis software
- Our initial next steps
 - Understand company objective, mission, sales flow
 - Interview struggling and experienced sales designers, B2B clients, B2C clients
 - Create a consistent sales cycle

SWOT ANALYSIS

Strength	Weakness	Opportunities	Threats
<ul style="list-style-type: none">• Longstanding customer relationships• Great product knowledge• Exclusive product selection• Trusted Brand/Reputation	<ul style="list-style-type: none">• No standard way of tracking sales• Inconsistent sales process• Lack of company culture• No CRM	<ul style="list-style-type: none">• Build upon loyal customer base• CRM can provide metrics tracking• Providing loyalty incentives/expand exclusive offerings• Build solid org structure	<ul style="list-style-type: none">• Competitors using more technology• Infrequent purchase• High price is a barrier to entry



Objectives and Deliverables

Objectives

Lack of metrics tracking



Consistent CRM usage

Inconsistent sales strategy



Cohesive sales processes

Lengthy training
materials



Engaging trainings through
slideshows and videos

SHOW CABOT HOUSE'S VALUE

Specific Goals

1. 95% of new customers logged in Storis within 6 months
2. Every designer views trainings and reads the playbook for consistent strategy and understanding of metrics
3. Designers hit quotas, ramping up to \$100k/month

SHOW THE COMPANY'S VALUE

Deliverables



Sales Playbook



Training Slides



Training Videos

The Playbook

A 50-page comprehensive guide, including:

- Company Overview
- Sales Philosophy
- Customer Personas
- B2C Sales Process
- B2B Sales Process
- Metrics, Quotas, and Commission
- CRM
- Scripts, Templates, and Other Resources
- Conclusion

The Training Materials

B2C Guide

B2B Guide

Storis Guide

Storis Video

B2B Video

B2C Video

Training videos and links

removed to maintain
confidentiality.

BUYER PERSONAS

Buyer Persona

Purpose

- Your buyer persona will help you identify qualified leads and guide them throughout the sales process
- Enables you to understand their needs, motivations, and buying behaviors
- **Ultimately, it will help you understand your potential customer so you can tailor your selling strategy and close more**

B2C PERSONA

Kate Sullivan
Successful Neurosurgeon

Age: 57

Relationship Status: Married



Additional Information:

- Worked with Designer at the Company 8 years ago, loved personalized service
- Recently bought a beach house on the Cape
- Has told her friends about the Company
- Appreciates in-person home visits and hands-on designers

The Company's Value: Personalized service building long-term relationships

B2B PERSONA

Serenity Interior Design Boutique Luxury Design Firm

Operating for: 3 years

Annual Revenue: \$2 million

Location: Framingham, MA



Additional Information:

Clients want D&G pieces and they're having trouble sourcing them

Client base is extremely wealthy

- Budget for Company is \$50-100k

The Company's Value: Unrivaled brand offerings, excellent service, knowledgeable designers

Primary Research Recap

INTERVIEW RECAP

-  **Designers:** 10 (new and experienced)
-  **Customers:** 5 (B2C and B2B)
-  **Competitors:** Went in-person to 2 competitors

B2B Interviews Recap

- 1 B2B Interviews with long-standing partner

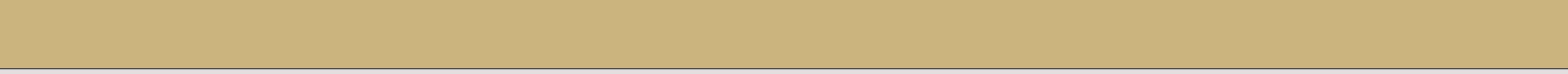
Interviewee Profiles:

- Interior design professionals working on both soft and hard goods
- Long-term clients, met at High Point Market
- Currently working closely with CEO and Sales Manager

B2B Interviews Recap

What We Learned:

- Trust & Transparency:
 - Client highly value the honesty and strong moral foundation of the Company's team.
- Communication is Strong—But Could Be Streamlined:
 - Constant communication is great, but tracking through email is overwhelming; a more centralized doc would improve organization.
- Manufacturer Relationships Are a Major Strength:
 - Client mentioned reliability and confidence in delivery and quality due to the Company's vendor network.



B2B Interviews Recap

Affirmed Strengths:

- Personalized service
- Product knowledge and guidance
- Strong logistics and team coordination

Opportunities to Improve:

- Streamlined tracking system (not just via email)
- Optimized organization across communication touchpoints

B2C Interviews Recap

- 4 B2C Interviews with repeat customers

Interviewee Profiles:

- Long-term loyal customers
- Interior design-savvy individuals
- New England-based clientele with varied financial backgrounds

B2C Interviews Recap

What We Learned:

- What's Working:
 - High-touch personalized service – especially from long-time associates
 - Trust and relationship-based loyalty – customers return because of consistency, not convenience
 - Product quality & delivery – described as “first-class”
- Opportunities to Improve:
 - Loss of Portsmouth showroom left a void in convenience and inspiration
 - Accessibility & in-person browsing are valued even in an increasingly digital landscape
 - Visibility and marketing - great service is largely discovered through word-of-mouth

B2C Interviews Recap

Affirmed Strengths:

- Personalized service
- Emotional Connection: Handwritten cards, dinner visits, drive loyalty
- Reputation: Referrals, clients actively recommend the Company

Opportunities to Improve:

- Again, streamlined tracking system
- Localized marketing: re-engaging past showroom cities with events

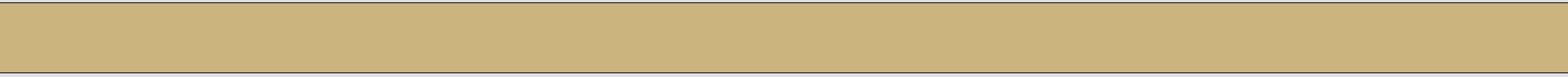


Best Designers Interviews Recap

- 4 Interviews with most experienced/best designers

Interviewee Profiles:

- Longterm designers in the industry
- Mixture of B2C and B2B focus



Best Designers Interviews Recap

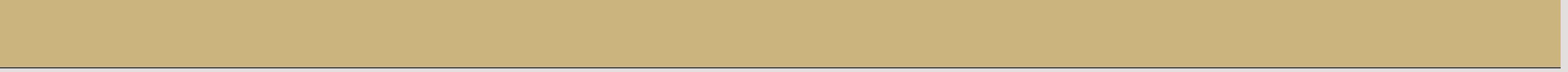
What We Learned:

- **Strengths:**
 - Deep commitment to client relationships
 - High client retention via referrals and trust
 - Personalized, emotionally intelligent selling
 - Passion for design + strong product knowledge
- **Challenges:**
 - Gaps in formal Storis + sales training
 - Inconsistent onboarding processes
 - Varying comfort with business/admin tasks
 - Sales sometimes viewed as "negative" by creative staff

Best Designers Interviews Recap

Opportunities to Improve:

- STORIS:
 - Widely used but limited training
 - Errors in entry → stress & inefficiencies
 - Suggest: Formal onboarding, reference guides
- Sales & Business Training:
 - Desire for stronger foundations in client management, pricing strategies
 - Shift mindset: Sales as service, not pressure



New Designers Interviews Recap

- 4 Interviews with new designers

Interviewee Profiles:

- Mixture of experienced and new/struggling designers
- Eager to learn, focus on trust-building, and goal-oriented

New Designers Interviews Recap

What We Learned:

- **Strengths:**
 - Building Relationships: All interviewees emphasized the importance of building trust with clients.
 - Product Knowledge: A deep understanding of products is essential to sales success.
 - Sales Strategies: Different approaches to selling, from initial greeting to closing deals.
- **Opportunities for Improvement:**
 - STORIS: Many found the current system difficult to navigate. There's a need for more intuitive training and streamlined workflows.
 - Sales Process Transparency: Designers need more consistency in product knowledge and clear instructions for updating information.
 - Training Support: Modules < Other materials

New Designers Interviews Recap

- **Affirmed Strengths:**

- Strong interpersonal skills help foster relationships that lead to successful sales.
- Confidence in product knowledge is crucial.

- **Opportunities for Improvement:**

- More Comprehensive Training: Streamlined onboarding process for new designers.
- Simplify Story System: Need more user-friendly interface for easier navigation.
- Standardized Communication Tools: Templates or frameworks for client communications could reduce inconsistencies.

Competitor Visits Recap

- **In Person Experience**

- Well laid out floorplan
- Calm atmosphere, low pressure sales
- 3D modelling software
- Had packets and brochures that visitors could take

- **Post Sales Experience**

- Gave them an email, no response
- Emailed both people, no response as well

Sales Philosophy

Sales Philosophy

1. RELATIONSHIP BASED
SELLING:
SELLING = HELPING

SEAMLESS CUSTOMER
EXPERIENCE
= DESIGNERS ARE SALESPeOPLE

INSTILL CONFIDENCE 40

Relationship Based Selling:

SALES ARE ROOTED IN GENUINE HUMAN CONNECTIONS

- Conversations go beyond the products
 - Recommendations tailored to day to day living
- Follow ups are personal
 - Handwritten notes, gifts, dinners, check ins
- Referrals and repeat clients
 - Value customers to maintain high retention,
- Emotional Intelligence
 - Understand client feelings and adapt to build authentic bonds

Seamless Customer Experience

**COMBINES DESIGN EXPERTISE WITH SALES FLUENCE AND
EMOTIONAL INTELLIGENCE**

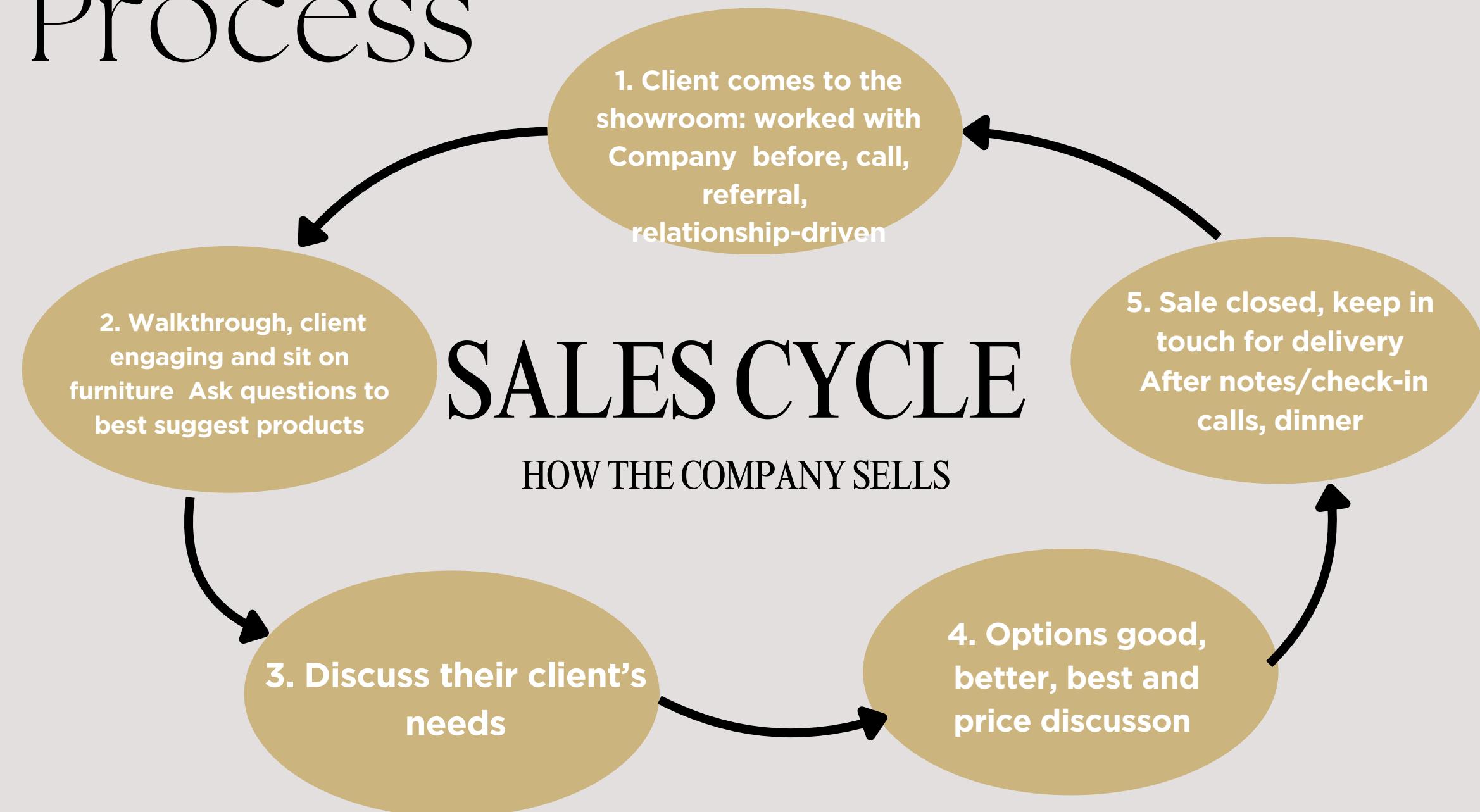
- Client journey is one cohesive experience
 - Partnership from showroom to final delivery
- Greet customers with warmth and space,
 - A sense of comfort without overwhelming
- Home Visit
 - Use design expertise and client knowledge to build best vision
- Accurate and detailed information
 - Handled with transparency from start to finish

Instill Confidence

BUILT THROUGH TRANSPARENCY, PERSONALIZATION, AND
EDUCATION

- Speak knowledgeably about brands
 - Expert on every product to answer any question
- Explain pricing with care
 - Feel comfortable with what they are spending
- Ask open-ended questions
 - Uncover needs and guide experience without sales process
- Transparency
 - Any potential issues are matched with a solution.

Sales Process



B2C Sales Process

The B2C Sales Process

B2C Value Proposition: Personalized service, luxury offerings, relationship

FIRST
CONVERSATION



HOME CALL



CLOSING



KEEPING IN
TOUCH



First Conversation: New B2C

Goals



Get to know the customer and their needs



Aim to spend 1-2 hours conversing and interacting with pieces



Build a connection so they come back to see the designer

First Conversation: New B2C

Overall Process

1. Ask “**Can I help you?**” to establish a relationship based on helping.
2. Walk around the showroom, having them **sit on furniture** and envision themselves in it.
3. **Discuss various options** and the luxury provides
4. **Provide contact information and discuss a home call** (if applicable)
5. **Add the customer to Storis using these instructions**

First Conversation: New B2C

Example Questions

Ask open-ended, non-invasive questions.

1. What neighborhood do you live in?
2. Do you have kids?
3. What do you do for work?
4. What brought you to Cabot House?
5. When was the last time you shopped for furniture?
6. What feel are you aiming for in this project?



First Conversation: Repeat B2C

Goals



Reconnect with the customer



Understand what brought them back and what they need



Show them new pieces

First Conversation: Repeat B2C Overall Process

- 1. Reconnect** through genuine questions and conversation
- 2. Discuss what brought them back** to the Company
- 3. Discuss what rooms** they want to furnish
- 4. Set up in-house visit** (if applicable)
- 5. Update customer notes in Storis** using these instructions

First Conversation: Repeat B2C

Example Questions

Ask questions that show you care and build an understanding of what they're looking for this time.

1. How is X family member doing?
2. How are you enjoying X piece of furniture?
3. What are your goals for this project?
4. Are there any pieces you've had your eye on?
5. Is there a specific style you're looking for this time?



The Home Call

Goals

Many customers have cited home visits as one of their **favorite aspects of the Company's exceptional service.**



Establish a **vision** for the space and help the customer see it



Take necessary **measurements**



Ensure confidence that you're offering the **right pieces**

The Home Call

How to Offer a Home Call

- **Not all customers will want a call or see their value.**
- Bring it up **naturally** -- “Would it help to come take a look at the room and see the design?”
- Discuss how home calls have **benefitted others**
- Name specific **gaps in knowledge** and how a home call would help, for example, needing to understand the spatial makeup of the room. 54

The Home Call

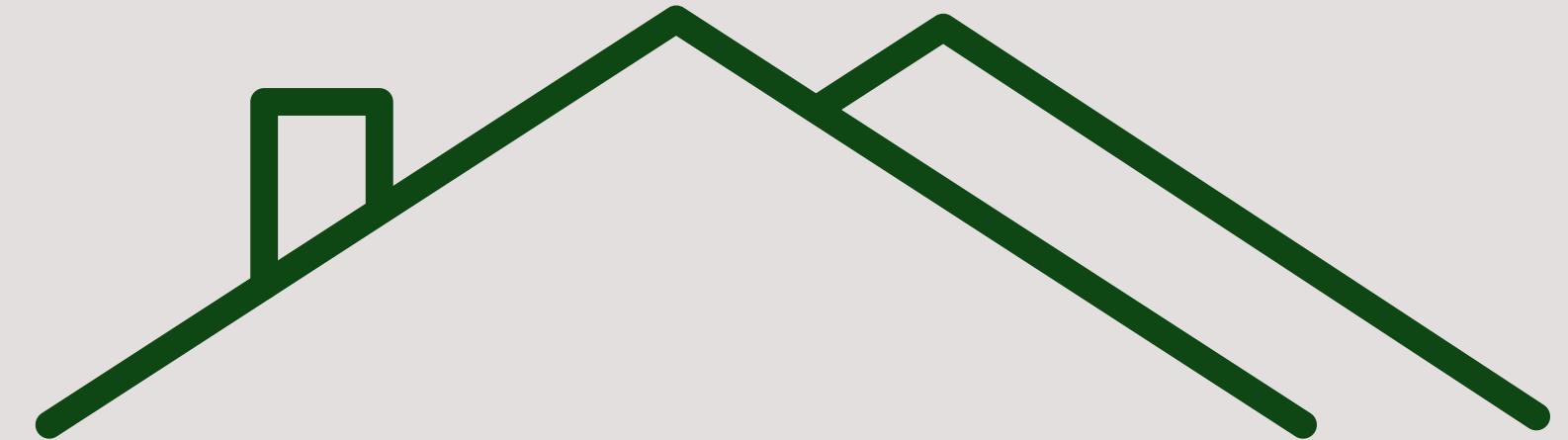
Customer Types

1. *Confident/Simple Project*: May not need a call or only want one during delivery.
2. *Confident/Complex Project*: These understand the value of a home call, the challenge is selling them on the Company
3. *Unsure/Simple Project*: Explain the benefits of a home call for bringing clarity to their process
4. *Unsure/Complex Project*: These also understand home calls' value, need to be sold on the process

The Home Call

During the Visit

1. A single-room call should last around **45 minutes**.
2. Take necessary **measurements**.
3. Discuss **key business factors**, including:
 - a. Specific products
 - b. Timeline
 - c. Pricing
4. Set guidelines for **future communication** and closing the sale.



Know the Product

ITS A NECESSITY TO KNOW THE PRODUCT
FROM GOOD->BETTER->BEST

PLEASE REFER TO THE COMPANY'S DRIVE
HERE TO REVIEW ALL THE CURRENT AND PAST
PRODUCT LISTINGS

Providing a Quote

Try to get the customer in-person.

When quoting in-store, you can give less of a discount.

If quoting over the phone, customers can easily call competitors and start a bidding war.

How to Close

PROVIDE ALL THE
NECESSARY TOOLS &
INFORMATION

CHECK IN TO GAUGE
THEIR FEELINGS

ADDRESS BUYERS
REMORSE BEFORE IT
HAPPENS

Additional Aspects of our B2C Guide



Detailed advice, example questions, and templates



Sales funnel with metrics for success



Discussion questions for in-person or synchronous trainings



20-minute videos of us presenting the slides for asynchronous trainings

B2B Sales Process

The B2B Sales Process

B2B Value Proposition: Organized service, timely communication, unique offerings

FIRST
CONVERSATION

OFFERING
PRODUCTS

QUOTES AND
ORGANIZATION

KEEPING IN
TOUCH



Your First Conversation

Overall Process

1. Could be over the phone or in a showroom.
2. Ask **what pieces they're looking for**. They may have specific items in mind for a client or a more general idea.
3. Ask about timeline, budget, and project scale.
4. Make sure to establish clear communication guidelines – effective communication is essential to B2B personas.

Your First Conversation

Example Questions

Ask questions to understand them and their clients:

1. Could you describe your typical client?
2. What budget range is your client looking for?
3. Do you have specific items in mind, or a more general vision?
4. What brought you to in?



First Conversation:

Goals

-  Get to know the firm and their needs
-  Get to know their client base
-  Build a connection so they come back to see you

Offering the Right Products

- Be a Product Curator

Curate a focused selection based on the client's goals—don't overwhelm them with everything.

- Use Vendor Relationships

Offer trade-only pricing, exclusive SKUs, and expedited sourcing via our vendor network.

- Simplify Customization

Make custom finishes, fabrics, and sizes seamless to specify and order.

- Be Transparent with Logistics

Communicate lead times clearly. If delays arise, offer smart alternatives fast.

- Help Grow Their Business

Be reliable, efficient, and solutions-oriented—become their go-to sourcing partner.

Understand our Offering

This is paramount to B2B

We have an incredible amount of inventory, and being able to quickly either recall or find facts about our pieces can be the difference between a sale and a missed opportunity

- Pay attention during vendor demos
- Be familiar with our inventory system so that if you do not know the answer to a customer question, you can find it

Providing a Quote

- B2B clients compare vendors – your quote should stand out as curated and value-driven.
- Think of it as part of the design experience, not a transaction.
- Your job: Deliver a clear, aligned, and professional proposal.

Understanding Client Scope

- Clarify your client's top priorities:
 - Speed?
 - Quality?
 - Balance of both?
- For designers: Understand project size and goals

Curate the Right Options

- Don't just present what's unavailable – offer viable alternatives
- Proactively address:
 - Lead times
 - Stock issues
- Temporary stand-ins or phased deliveries

Quote Creation

- Include:
 - Product price
 - Customization fees (if any)
 - Delivery & installation
- If applicable:
 - Trade discounts
 - Volume pricing
- Keep the quote clean, easy to understand, and visually appealing

Present the Quote

- Frame the quote as a thoughtfully curated selection, not just numbers
- Be open to feedback:
 - Adjust items
 - Modify pricing
 - Shift timelines
- Show that you're their trusted design partner, not a vendor

Why Organization Matters

Designers juggle multiple clients and projects—organization helps deliver a seamless experience.

- Great organization = repeat business
- Centralized info means better service, faster responses
- STORIS is your digital command center

Centralize Client Records

Know your client's story at a glance—no more scrambling for info.

STORIS Features:

- Each client has a full profile: preferences, purchases, notes
- Assign unique client IDs for easy tracking
- Review previous quotes, conversations, orders in one place

Utilize these features - It will make your life easier!

Manage Tasks

Clients love timely check-ins—this builds trust.

Use STORIS to:

- Set follow-up reminders
- Track project timelines
- Assign next steps for each client

Why Documentation Matters

If it's not documented, it didn't happen.

- Keeps projects on track
- Minimizes errors
- Builds trust and transparency

Record Every Client Touchpoint

Summarize every conversation, especially when decisions are made.

STORIS lets you log:

- Notes from calls and meetings
- Text/email summaries
- Design decisions and swatch approvals

Keep Your Data Clean & Current

Use STORIS to ensure your info is always accurate and easy to update.

STORIS Helps You:

- Import inventory updates, track order statuses
- Stay aligned with availability and lead times
- Eliminate guesswork in sourcing

Know the Product

ITS A NECESSITY TO KNOW THE PRODUCT
FROM GOOD -> BETTER -> BEST

PLEASE REFER TO THE CABOT HOUSE DRIVE
HERE TO REVIEW ALL THE CURRENT AND PAST
PRODUCT LISTINGS

Additional Aspects of our B2B Guide



We include more detailed advice, templates, discussion questions, and more in our B2B slides, similar to B2C.

We also made a video for asynchronous training.

Metrics

Metrics – Why do they matter?



Understand how well designers are connecting with clients and guiding them through the design journey.



They're not about pressure – they're tools for growth, reflection, and better service.



Identify designers strengths and refine their approach.

KPI Overview

- KPIs help you understand where designers are in their development.
- As they progress from beginner to full-speed, your expectations evolve, while maintaining focus on design and client experience.
- The following slides break down KPIs by focus area.

KPI Overview

Learning & Engagement

KPI	Beginner	Ramping	Full-Speed
Training Completion	100% in first 30 days	-	-
Shadowing & Mentorship	10 hrs in first month	15–20 hrs	Ongoing as needed
Customer Interactions/Week	15–20	25–30	30–40

KPI Overview

Conversion & Follow-Through

KPI	Beginner	Ramping	Full-Speed
Quote-to-Close Ratio	10–15%	15–20%	25–30%
Closing Ratio	10–15%	20–30%	30–40%
Client Follow-Up Rate	80%+	85–90%	90–95%

KPI Overview

Sales Performance

KPI	Beginner	Ramping	Full-Speed
Monthly Sales	\$10K-\$20K	\$30K-\$60K	\$100K+
Average Sale Price (ASP)	\$5K-\$8K	\$7K-\$10K	\$10K-\$15K
Monthly Revenue Growth	-	15-20%	20-30%

KPI Overview

Relationship Building

KPI	Beginner	Ramping	Full-Speed
Repeat Customer Rate	15–20% (within 1 yr)	25–30% (within 1 yr)	40–50% (within 2 yrs)
Lead Conversion Time	2–3 months	1.5–2 months	1–1.5 months
Referrals Generated	–	1–2/month	2–3/month
Customer Lifetime Value	–	–	\$150K+ per repeat customer
Deal Growth (AOV)	–	–	100% increase from repeat sales

ASP

Customer Type	Average Sale Price (ASP)	Details
B2C (Homeowners)	\$10,000+	High-end, personalized residential purchases
B2B (Trade Clients)	Typically higher	Larger orders, customizations, commercial needs

Storis

Your Tracking Tool

STORIS helps you track:

- Customer interactions
- Orders and status updates
- Sales performance

Once designers are familiar with it, it **saves time** and helps them stay focused on the part they love—**designing and building relationships**.

Quotas

Understanding your goals

Quotas are aligned with designers growth. They reflect the ability to guide clients and deliver high-value experiences.

Designer Group	Monthly Quota	Customer Interactions	Estimated Sales
New Designers	\$30,000	10–15/week	3–4 sales (mostly B2C, avg. \$10K)
Ramping Designers	\$60,000	15–20/week	6–7 sales (primarily B2C, some B2B)
Full Designers	\$100,000+	20+/week	10+ sales (mostly B2C, with larger B2B as occasional adds)

Commission

- Designers earn commission based on vendor agreements.
- Most vendors offer a base commission of 6-8%, with some offering additional incentives based on volume or discounts.
- Your goal is to guide the client to the right product – not just the highest commission.

Commission details in final playbook.

Setting Monthly Sales Goal

Target: \$100,000/month

- To hit this goal, it's important for designers to understand how many clients they need to engage with—and at what stage.
- Each stage has a typical conversion rate—knowing these helps them plan their outreach.

Sales Funnels

Sales Funnel – B2B

Initial Inquiry / Introduction

- Trade professional visits showroom, emails, or is referred.

Project Discovery & Qualification

- Understand project goals, budget, and client priorities
- Use STORIS to record project details

Curated Product Proposal

- Present a thoughtful, tailored selection of products
- Confirm & prepare professional quote with STORIS

Project Approval & Commitment to Order

- Maintain communications about any order related updates
- Strengthen relationship

Unqualified Lead - 100%

SQL - 70%

Proposal - 40%

→ Commit to Buy - 20%

Assuming ASP of \$20,000 and a target of \$100,000

25

5

Sales Funnel - First Time Buyers

80

Walk Ins/First time customers entering to the store

- Assess customer, budget, needs
- Educate on brand and values

Buyer has shown interest and matches persona

- In home consultation, gather necessary information about space

Give customer full design recommendation

- Walkthrough of layout, furniture choices
- Budget/timeline breakdown

Customer makes the purchase

- Maintain communications about any order related updates

**Unqualified Lead - 100%****SQL - 70%****Proposal - 30%****Commit to buy - 15%**

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Assuming ASP of \$10,000 and a target of \$100,000

Sales Funnel – Repeat Buyers

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Previous customer who wants more

- Find out what they need and what is motivating purchase

Customer has a new need & budget it mind

- No need for introduction, speed up turnaround and make sure it is efficient

Give customer full design recommendation

- Walkthrough of layout, furniture choices
- Budget/timeline breakdown

Customer makes the purchase

- Maintain communications about any order related updates
- Strengthen relationship



Reengaged Customers- 100%



SQL - 85%



Proposal - 60%



Commit to buy - 45%

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Assuming ASP of \$20,000 and a target of \$100,000

Example Mix

Example Sales Mix

Repeat Customers (Higher ASP, Fewer Transactions)

Client	Purchase	Total
The Family	Custom Sectional Sofa – Italian Leather	\$18,000
Interiors (Designer)	6x Dining Chairs + Table	\$12,000
Hotel(Comercial)	4x Luxury Bedroom Sets	\$32,000
Subtotal		\$62,000

Example Sales Mix

First-Time Buyers (Lower ASP, More Transactions)

Client	Purchase	Total
The Patel Family	Living Room Set	\$9,500
Anna & Mark	King Bed Set + Nightstands	\$7,000
Jennifer S.	Custom Desk + Storage Cabinet	\$5,500
Subtotal		\$22,000

Example Sales Mix

Summary

Customer Type	Total Revenue
Repeat Buyers (3 Orders)	\$62,000
First-Time Buyers (3 Orders)	\$22,000
Total Sales	\$84,000

A Missing Link

- **Metrics are not consistently tracked or enforced**
 - No clear way to compare individual designer performance
 - Hard to identify what drives success (or where support is needed)
- **Root issue: “Sales” language doesn’t resonate with designers**
 - Metrics need to feel like creative guidance, not corporate pressure
 - Reframing is key to accountability, growth, and team alignment

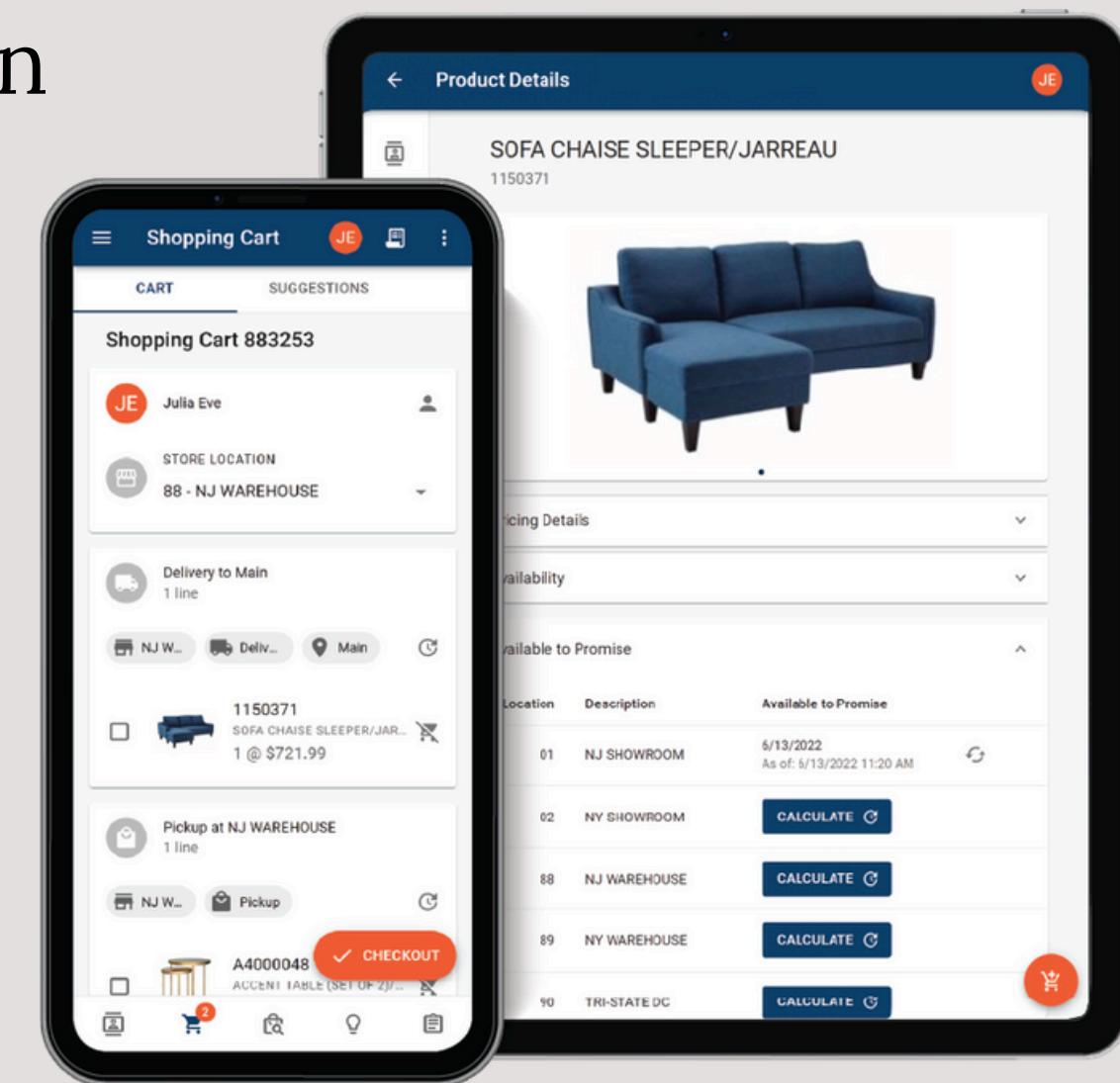
Storis

Why use Storis?

A CRM ALLOWS FOR A TEAM TO TRACK LEADS,
ONGOING SALES PROCESSES, AND OVERALL GAIN
A BETTER UNDERSTANDING OF CUSTOMER NEEDS.

Storis is key for a successful sale

- CRM is Essential: Organization and Collaboration
- Tracks the Full Journey
- Captures Key Details
- Improves Customer Understanding
- Boosts Sales Performance
- Supports Team Collaboration
- Drives Long-Term Relationships



Storis Guide

STORIS WORKFLOW OVERVIEW

The diagram illustrates the Storis Workflow Overview with seven sequential steps:

- 01 Creating a Relationship
- 02 Creating an Opportunity
- 03 Building and Reviewing the Cart
- 04 Updating the Relationship
- 05 Converting the Cart
- 06 Scheduling a Follow-Up
- 07 Updating Opportunity and Workflow

STEP 1: CREATING A RELATIONSHIP

1. Dashboard: Shows various performance metrics and opportunities.

2. Performance: Shows a bar chart of opportunities by stage.

3. Relationships: Shows a list of assigned relationships with a yellow circle highlighting the 'New' button at the bottom right.

STEP 4: UPDATING THE RELATIONSHIP

1. Shopping Cart: Shows a list of items in a shopping cart.

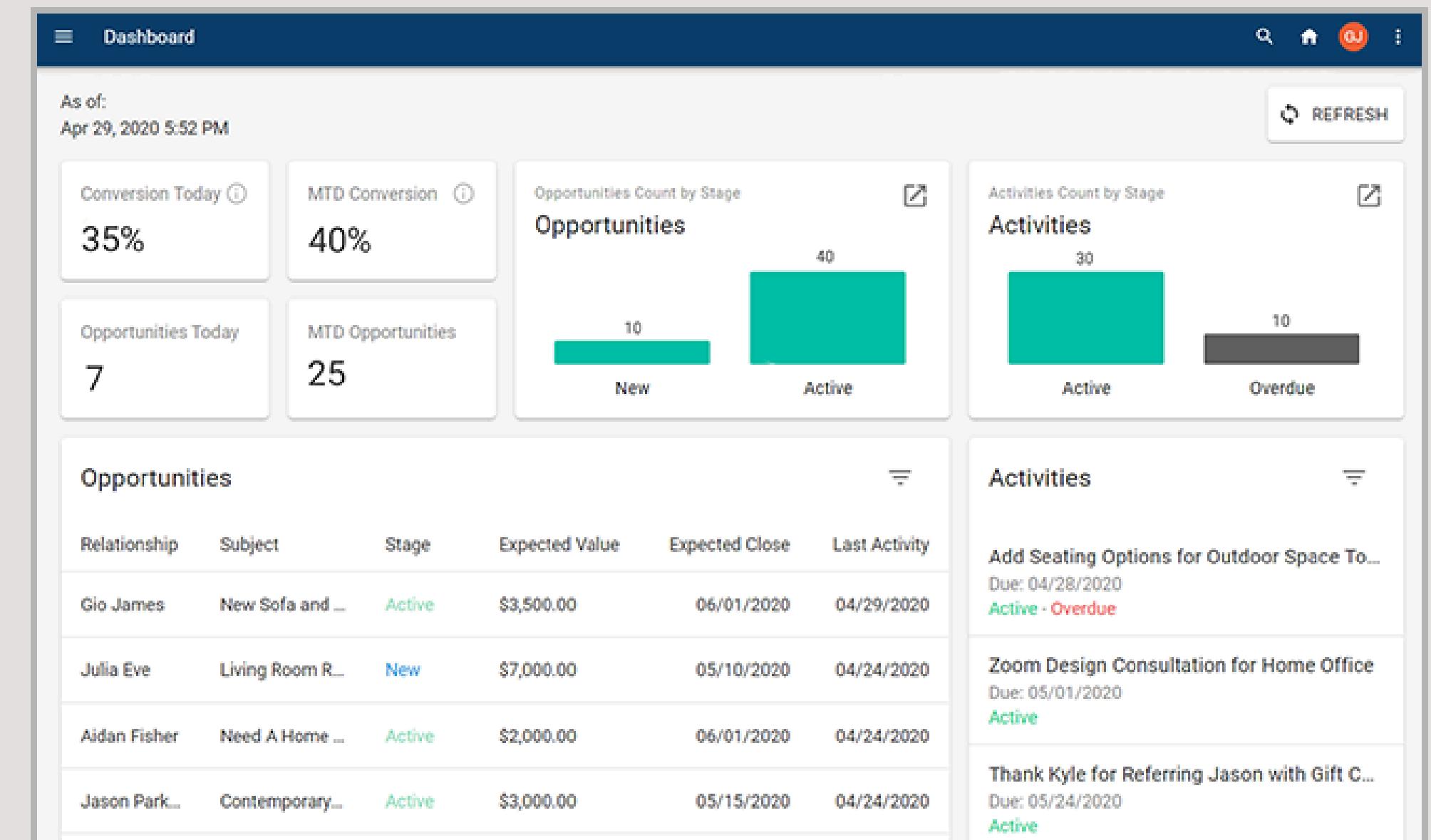
2. Edit Relationship: Shows the 'Relationship Details' tab with a yellow circle highlighting the 'Phone' field.

3. Edit Relationship: Shows the 'Contact Details' tab with a yellow circle highlighting the 'Email' field.

4. Edit Relationship: Shows the 'Address' tab with a yellow circle highlighting the 'Street Line 1' field.

Storis Training Process

1. Read Playbook
2. Watch Training Videos/Review Slide Deck
3. Set Up Account
4. Do a Practice Sale



Storis Training Goal

The designer will be...

1. Fluent in Storis terminology (leads, conversions, opportunities, etc.)
2. Able to input information into Storis with minimal/no questions



**STORIS IS THE ENGINE BEHIND CABOT HOUSE'S
SALES SUCCESS—KEEPING EVERY STEP ON TRACK
AND EVERY GOAL WITHIN REACH**

Additional Recommendations

Additional Recommendations

- **CRM**
 - Install a CRM
- **Enhance Company Culture**
 - In-Person Monthly Check-In with Team
 - In-Person Trainings
 - Defined Company Structure
- **Increase Customer Retention/Sales**
 - Loyalty Program (e.g., Company Club)



Conclusion

Conclusion

The Company is built on excellence in design, relationships, and service
But without clear metrics, accountability, and consistent tools, growth is
limited.

Align with CRM tools like STORIS, tailored quotas, curated client journeys
The opportunity: Build a high-performing, human-centered sales culture
that feels as elevated as the furniture we sell

Thank You

Cabot House Collection



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