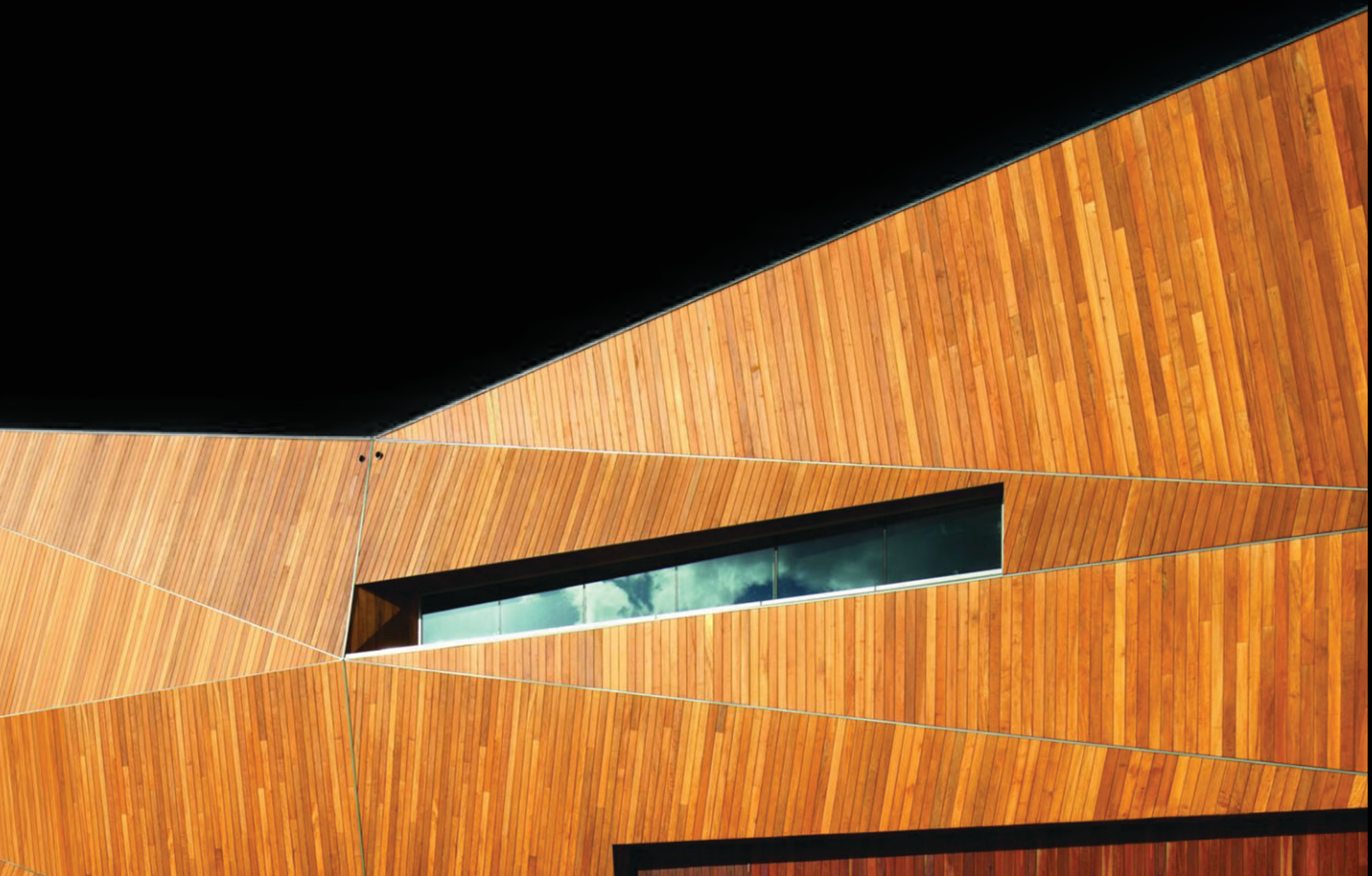
CUTEK®
WOOD SOLUTIONS

Sales Process Playbook

CUTEK®
WOOD SOLUTIONS

PURPOSE

Showcase and actively promote the use of wood in the building industry - Protect and enhance wood with powerful products that Actually Work.



PROMISE

"The Beauty of Wood, Powerfully Protected

CORE VALUES

- Problem solver for the timber/building industry
- Excellent Customer Service
- Generosity with expertise, time and product
- Always relevant, exceptional and scientifically/technologically innovative
- Professional products for both DIY customers and technical sectors
- Complicated concepts made simple (without losing technical agility)
- Honesty & Transparency
- Value

Contents

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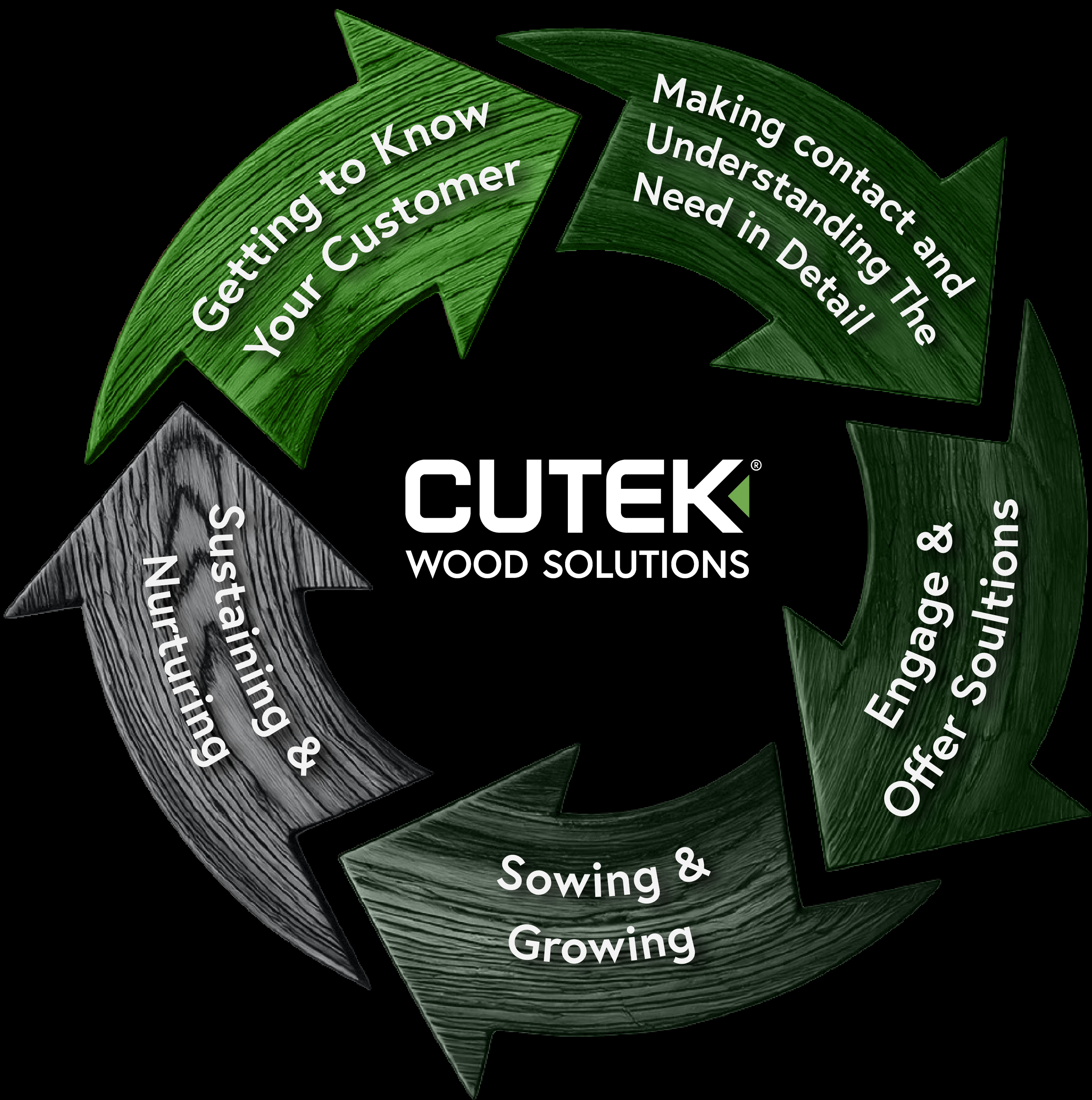
Sales Process



Stage	People	Process
1. Getting to Know Your Customer	Business Development Managers & Regional Account Managers	1a. Receive and Qualify Lead. 1b. Collate and Input All Leads Into CRM. 1c. Allocate and Assign Leads. Either Automated or via Sales Manager.
2. Making Contact and Understanding the Need in Detail	Business Development Managers & Regional Account Managers	2a. Review and Research Assigned Leads. 2b. Develop a Contact Plan for Person-to-Person (P2P) Outreach Based on the Assigned Customer Group. 2c. Make Contact - Person-to-Person. No emails. CONNECTION 2d. Capture Call Details in CRM With Next Steps—Next Contact, Site Visit, or Follow-up Call. Add Preparation Notes as Needed. 2e. Consolidate Call and Send Follow-up Email. NO CONNECTION 2f. Send an Acknowledgement Email (Refer to Template). Schedule a Follow-up Call in CRM (1 Business Day). FOLLOW UP CONNECTION SUCCESSFUL 2g. Capture Call Details in CRM With Next Steps—Next Contact, Site Visit, or Follow-up Call. Add Preparation Notes as Needed. FOLLOW UP CONNECTION NOT SUCCESSFUL SEND 'OVER TO YOU' EMAIL 2h. Update CRM.
3. Engage & Offer Solutions	Business Development Managers & Regional Account Managers	3a. Prepare for Customer Engagement Based on Group Type and Agreed Approach. 3b. Complete Engagement. 3c. Update CRM with Suggested Solutions, Next Steps, and Group Type.
4. Sowing & Growing	Business Development Managers & Regional Account Managers	4a. Who Are We Serving? Identify and Nurture Existing Customers Based on Group Type. 4b. Planting the Seed. Develop an Action Plan for New Business Opportunities.
5. Sustaining & Nurturing	Regional Account Managers	5a. Create Global Strategies. 5b. Develop Strategic Tasks by Customer Type.

CUTEK
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How We Do It Differently

CUTEK® PRODUCTS

- Unique, adaptable and proven formulations created by scientific and technical experts which can be customised to suit specific project requirements.
- More than looks: long term preservation & protection that actually works.
- Not 'skin deep' like competition: diffuses deeply to repel moisture from inside out. Also Self-Healing continually active in the timber, moving to any cut or perforation.
- Problem Solvers: Originally developed to solve problems for the timber/building industries.
- Simple (on the front end): compact but complete range of exceptional core products and Colourtones.
- Easy to use – and easy to continue to use (Preparation and Maintenance)

CUTEK® PEOPLE

- Honest about what our products can and can't do.
- Combination of serious technical expertise with real-world experience and everyday savvy.
- Passionate about preserving and protecting timber and buildings.
- A helper to all – DIY through to Architects (and everyone in between).
- Passionate about the continued use of timber as a beautiful and highly sought after building material.
- Genuinely care about the environment.
- On-hand and readily available local support.
- Exceptional customer service in all areas.
- Ingrained family and Christian values.

Introduction

Purpose

The purpose of this playbook is to provide you, our salespeople, with a sales process to follow. This process will provide greater consistency and a standard to follow across our global team and will also improve the overall Customer Experience.

Scope

This sales process playbook is designed for our salespeople in order to understand the sales process for CUTEK® products. It is intended to focus on the process rather than providing details on each of the products.

Structure of this Playbook

The playbook is structured according to each stage of the sales process outlined at the front of this playbook:

1. **Getting to Know Your Customer**
2. **Making Contact and Understanding The Need in Detail**
3. **Engage & Offer Solutions**
4. **Sowing & Growing**
5. **Sustaining & Nurturing**

Within each process stage, there will be further detail on the steps required and any related supporting tools.

Roles and Responsibilities

This playbook outlines the sales cycle with respect to five key sales roles. Team members outside these roles do however have identified tasks that relate to the Sales Process, and these actions are included within the playbook. Any additional steps required by these roles to complete the identified tasks have not been detailed here.

The key sales roles outlined within this booklet are:

DLH Distribution Licence Holder	This entity has been granted exclusive distribution rights for CUTEK® products in their assigned territory and is ultimately responsible to CUTEK® head office for territory sales and customer service. This role requires significant capital investment and business acumen, along with the ability to build and lead a high-performing sales organisation. The Distribution Licence Holder drives market expansion, ensures profitable growth, and maintains brand integrity on behalf of CUTEK® Global, all while meeting sales targets and compliance regulations.
HBD Head of Business Development	This role is responsible for driving CUTEK®'s national expansion through strategic partnerships and high-value opportunities. The role leads the national sales force, develops strategic sales plans, and positions CUTEK® as an industry leader while negotiating major contracts and maintaining relationships with key industry stakeholders.
SSM State Sales Manager	This role is responsible for leading and developing sales teams within their designated state/territory, ensuring revenue targets are met through effective strategy and execution. The role coaches team members, manages stockist relationships, and creates a high-performance culture whilst taking full ownership of regional sales results.
SP Sales Person	This role is responsible for actively seeking sales opportunities and exceeding targets by positioning CUTEK® as a trusted solution for timber protection. The role builds strong relationships with builders, architects, manufacturers and stockists while providing expert advice on timber protection and maintaining a structured sales pipeline. This person is the *Ultimate Hunter*.
CSR Customer Service Representative	This role is responsible for being the first point of contact for customer enquiries, providing expert product advice and solutions-driven service, whilst ensuring every interaction builds trust and loyalty. *The Ultimate Farmer*, the role delivers helpful, professional support across phone, email and in-person channels while maintaining accurate customer records and supporting stockists.

The Ultimate Farmer & The Ultimate Hunter

Selling Styles

There are two distinct selling styles that can be found in virtually all sales environments or roles. Conventional wisdom suggests that successful sales teams require a balanced mixture of both approaches to achieve optimal results.

The Farmer

The Farmer is the salesperson who builds and cultivates relationships and opportunities, typically within existing accounts. Farmers excel at turning good customers into great ones through their natural ability to nurture relationships and earn loyalty through their consistent efforts. These sales professionals are eager to establish long-term relationships and cultivate them over many years. Farmers tend to be more adept at follow-up activities and attending to details than their Hunter counterparts, though they may not display the same level of aggression when pursuing new business opportunities.

The Hunter

The Hunter, conversely, derives their sales energy from the "hunt" for new opportunities. These consultative salespeople possess an innate ability to identify and assess potential within prospects, even when opportunities aren't immediately apparent, and can develop solutions to meet previously unrecognised needs. Hunters thrive on the process of finding and securing new customers. Whilst they may or may not be detail-oriented by nature, Hunters typically exhibit aggressive, extroverted traits and demonstrate a willingness to do whatever is necessary to win the business.

Depending on where an individual's natural style falls along this spectrum, they may be better suited for certain sales roles within an organisation.

The Portrait of a CUTEK® Salesperson

More Than a Salesperson—A Wood Champion

A CUTEK® Salesperson is not just a sales rep—they are a trusted expert, a solutions specialist, and an advocate for timber as a preferred building material.

They understand that every interaction is an opportunity to help, educate, and build relationships. They don't just sell products—they sell confidence, knowledge, and success.

They are driven by a deep belief in what CUTEK® stands for:

- Helping people achieve the best outcomes for their timber projects
- Championing the use of wood as a sustainable and desirable material
- Providing real-world solutions—not just making a sale

1. The CUTEK® Salesperson as a Trusted Guide

They don't approach conversations with a script—they approach them with genuine curiosity and expertise.

When a builder calls in a panic, unsure how to protect a client's timber deck, they don't push a product—they listen first:

"Tell me about the timber you're using—what's the end goal for your client?"

When an architect hesitates to specify timber, they don't just send a product brochure—they position wood as the superior choice:

"Timber is one of the most durable, adaptable materials available—let me show you how CUTEK® can make it last a lifetime with minimal maintenance."

When a DIYer is nervous about applying oil for the first time, they don't dismiss their concerns—they empower them:

"I know it might seem daunting, but I promise CUTEK® is easy to apply. Let's walk through it together!"

2. The CUTEK® Salesperson as a Problem-Solver

At CUTEK®, no two timber projects are the same—so a great salesperson is a master of asking the right questions and finding the perfect solution.

- **Timber Manufacturer:** "Are you currently pre-coating your timber? Let's explore how CUTEK® can increase efficiency while reducing callbacks."
- **Government Official:** "I understand compliance is key—here's how we can meet your slip-rating and sustainability goals while protecting your long-term investment."
- **Mass Timber Engineer:** "This is a unique project. Let's work with our R&D team to develop a tailored solution that meets your exact specifications."

They understand that some sales take time—custom solutions, testing, and compliance approvals may take months—but trust is built in the process.

3. The CUTEK® Salesperson as a Wood Champion

They know that timber is the future of sustainable building—and they make sure their customers know it too.

- When an architect wavers on specifying wood, they educate them on mass timber trends, sustainability benefits, and stunning real-world case studies.
- When a builder thinks wood is "too hard", they show them how CUTEK® makes maintenance easy and prevents costly replacements.
- When a government specifier worries about long-term durability, they present data-backed performance insights proving that CUTEK® extends the service life of timber—saving resources and money in the long run.

They believe that helping people choose timber today means a better built environment tomorrow.

4. The CUTEK® Salesperson as a Relationship Builder

They understand that a single sale is great—but a long-term relationship is even better.

- They follow up—not because they're chasing a sale, but because they genuinely care about how a project turned out.
- They remember details—the builder's favourite timber species, the architect's design aesthetic, the DIYer's past colour choice.
- They log everything in the CRM—because the best service happens when you can pick up a conversation months or even years later without missing a beat.

They know that customers come back when they feel valued, understood, and supported.

5. The CUTEK® Salesperson as a Sales Closer

While education and problem-solving are key, they also know that sales drive success.

- They confidently recommend the right product at the right time—because they know it will genuinely help the customer succeed.
- They proactively offer samples, site visits, and CPD sessions—because they know that seeing is believing.
- They know when to ask for the sale—but they do it in a way that feels natural, consultative, and valuable.

- "Would you like us to arrange a sample and pricing so you can test this solution on your next project?"
- "I'd love to set up a CPD session for your firm—when would be a good time?"
- "Since CUTEK® is already specified on your job, shall we coordinate product delivery to make sure you're ready to go?"

They don't just take orders—they create demand by helping customers see the value of protecting and enhancing timber with CUTEK®.

The Heart of a CUTEK® Salesperson

- They care deeply about their customers' success.
- They listen first, then provide tailored solutions.
- They know timber inside and out and advocate for its use.
- They build long-term relationships, not just one-time transactions.
- They confidently drive sales, knowing they are providing real value.

Most of all, they are true Wood Champions.

Final Thought

A CUTEK® salesperson is part expert, part problem solver, part educator—and 100% committed to the success of their customers and the timber industry.

And that's what makes them the best in the business.

The Portrait of a CUTEK® Customer Service Rep

The Stockist Specialist

A CUTEK® Customer Service Representative isn't just a voice on the phone or a name on an email. They are the heartbeat of our retail network, ensuring that every stockist has what they need to sell confidently, train effectively, and represent CUTEK® with excellence.

They understand that without stockists, people couldn't buy our products—so they make it their mission to support, equip, and empower retail stores to sell CUTEK® successfully.

1. The CUTEK® Customer Service Rep as a Trainer and Educator

They don't just answer questions—they train, guide, and inspire store teams to become timber care experts.

- When a new store stocks CUTEK® for the first time, they walk the staff through everything they need to know:
  "Let's go over how CUTEK® works, why it's different, and how to explain that to customers."
- When a store has high staff turnover, they patiently re-train new team members, making sure no one is left feeling unprepared:
  "No worries that your team has changed! Let's set up a quick refresher session to make sure everyone feels confident selling CUTEK®."
- They anticipate gaps in knowledge and proactively offer training before there's a problem.
  "I noticed a few customers have been calling us instead of getting help in-store—would you like me to run a quick training on timber preparation and coating?"

They take pride in helping store teams become experts, ensuring that customers trust the advice they receive in-store.

2. The CUTEK® Customer Service Rep as a Stockist's Biggest Advocate

A great stockist isn't just a shelf with products—it's a sales partner.

The best CUTEK® reps understand that a store's success is our success—so they make sure every store is set up for it.

- Checking that stores have all the POS materials they need—brochures, shade cards, signage, and sample boards.
- Ensuring their CUTEK® display is looking clean, stocked, and inviting.
- Confirming they're meeting all the requirements to stay on our Store Finder, so we can confidently send customers their way.
- Asking key questions to support the store:
  - "How are CUTEK® sales going in your store?"
  - "Do you have any questions coming up that we can help answer?"
  - "Is there anything you need to help make selling CUTEK® even easier?"

They don't just wait for a problem—they proactively help stores succeed.

3. The CUTEK® Customer Service Rep as a Sales-Driven Partner

They know that helping stores sell more CUTEK® is a win for everyone—so they always make sure to ask for the replenishment order.

They see the opportunities others might miss:

- They know when stock levels are low and remind store teams before they run out.
  "I noticed you're running low on CUTEK® Restore—shall we place a top-up order?"
- They prompt action when stores are behind on orders.
  "Last time we spoke, you mentioned wanting to stock more sample pots—let's get those sorted now."
- They make the ordering process easy so it's never a hassle for store managers.
  "I can set that up for you right now—let's get it booked in."

They understand that a customer is often converted in-store—and if stock isn't available, a sale is lost.

4. The CUTEK® Customer Service Rep as a Brand Ambassador

They take pride in how CUTEK® looks and feels in every store.

- They regularly check on the condition of displays—making sure CUTEK® stands out among the competition.
- They encourage stockists to keep demo units clean and samples fresh so customers can see the beauty of CUTEK® firsthand.
- They remind stores to display CUTEK® brochures in the right places—because the right information helps close a sale.

They know that a well-presented brand inspires confidence—and they go the extra mile to make sure CUTEK® shines.

5. The CUTEK® Customer Service Rep as a Relationship Builder

They know that great service keeps stores engaged—and engaged stores sell more CUTEK®.

- They check in regularly, even when there's no urgent issue.
- "Just touching base to see how everything is going—how's CUTEK® moving in-store?"
- They build genuine relationships so that stockists see them as a trusted partner, not just a supplier.
- They log everything in the CRM, so if a different CUTEK® rep steps in, they can seamlessly continue the conversation.

They remember the little details:

- Which store manager loves to talk timber
- Which stockist struggles with display organisation
- Which team needs extra training sessions

Because at the end of the day, stockists who feel supported and confident will always recommend and sell more CUTEK®.

The Heart of a CUTEK® Customer Service Rep

- They train, educate, and support retail teams to sell CUTEK® successfully.
- They take care of every stockist, ensuring they have the tools, knowledge, and materials they need.
- They take pride in the CUTEK® brand—ensuring in-store displays, brochures, and samples look great.
- They keep stock flowing, always ensuring stores have what they need to sell.
- They build lasting relationships, making every stockist feel like a valued partner.

Most of all, they understand that every store matters—and that every customer who walks into that store deserves the best possible introduction to CUTEK®.

Final Thought

A CUTEK® Customer Service Rep is part trainer, part problem solver, part sales enabler—and 100% committed to helping our stockists thrive.

And that's what makes them the best in the business.

Customer Type

The 5 CUTEK® Customer Types are:

A. Timber/Wood Manufacturer
B. Architects
C. Government Sales (Government-Funded Infrastructure Projects)
D. Builder / Deck Restoration Company / Applicator
E. DIY Customers

Stockists and Resellers

Even though they are not a direct CUTEK® user, they buy our products and make up the majority of our sales. They onsell our products to our end user/customer, who then requires customer service or advice.

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Stage 1: Getting to Know Your Customer

Overview

This stage focuses on understanding the customer's needs, pain points, and decision-making criteria to ensure CUTEK®'s solutions align with their goals. By thoroughly qualifying and engaging with leads, the sales team can build strong relationships, tailor their approach, and move opportunities forward effectively. This stage sets the foundation for a customer-centric sales process that drives meaningful outcomes.

CUTEK WOOD SOLUTIONS

Steps

1a. Receive and Qualify Lead.

1b. Collate and Input All Leads Into CRM.

1c. Allocate and Assign Leads.
Either Automated or via Sales Manager.

1a. Receive and Qualify Lead

Review Incoming Leads

This step involves identifying and assessing new leads as they enter the pipeline.

CUTEK®'s leads can come from:

- **Phone call to CUTEK® hotline:** Direct enquiries from prospects seeking immediate assistance or information.
- **Social Media:** Prospects engaging with CUTEK®'s content via platforms like LinkedIn, Instagram, or Facebook.
- **Website/Google Ranking:** Visitors finding CUTEK® through organic search or paid ads and then reaching out to us via our websites.
- **Word of Mouth:** Referrals from satisfied customers or industry partners.
- **Interactions at Tradeshows and Events:** Face-to-face engagement with potential customers at industry exhibitions.

Regularly reviewing incoming leads helps spot trends and adjust strategies to meet sales targets.

TIPS

- The wood industry is built on long-term relationships, so capturing all relevant customer information from the outset is essential.
- Schedule a daily or weekly time slot to review new leads and ensure timely follow-up. All high-priority leads should receive an initial response [within 24 hours] to maximise engagement and conversion potential.

At CUTEK®, we don't just sell products—we help people. Every interaction is an opportunity to champion wood and support our customers in making the best choices for their projects. Whether they're a homeowner, builder, architect, or timber supplier, our goal is to listen well, understand their needs, and provide expert guidance.

Incoming Leads and Enquiries

When answering an enquiry phone or other enquiry, follow these six key steps to create a welcoming, helpful experience.

- **Helpful hint**
  Make sure you take good notes during this conversation! You'll need them for the next step.

1. **Start with a friendly greeting.**
   - "Thanks for calling CUTEK®, this is [Your Name]. How can I help you today?"
   - If it's a written enquiry, acknowledge them warmly before diving into their question.
2. **Find out who you're speaking with.**
   - "Can I grab your name and business (if applicable), so I can better assist you?"
   - If they're a returning customer, take a moment to acknowledge them.
3. **Understand their needs.**
   - "Tell me a little more about your project or what you're trying to achieve."
   - "What's the biggest challenge you're facing?"
   - "Are you working with a particular timber type, or is this a general enquiry?"
   - This helps us ask the right follow-up questions and guide them to the best solution.

4. **Offer guidance, not just answers.**

CUTEK® staff aren't just order-takers—we're trusted advisors.

- **If we have a solution:**
  - "That's something we can definitely help with! Here's what I'd recommend…"
- **If you're not the right person to help but someone else at CUTEK® can:**
  - "I want to make sure you get the best possible advice. Let me connect you with our [appropriate expert/team] who can help with this."
  - If they need to wait for a response, give them a timeframe and ensure follow-up through CRM notifications.
- **If we don't:**
  - "That's a great question. While CUTEK® might not be the perfect fit, here's something that could help…

5. **Ask for their contact details.**

- "What's the best number or email to reach you on in case we need to follow up?"

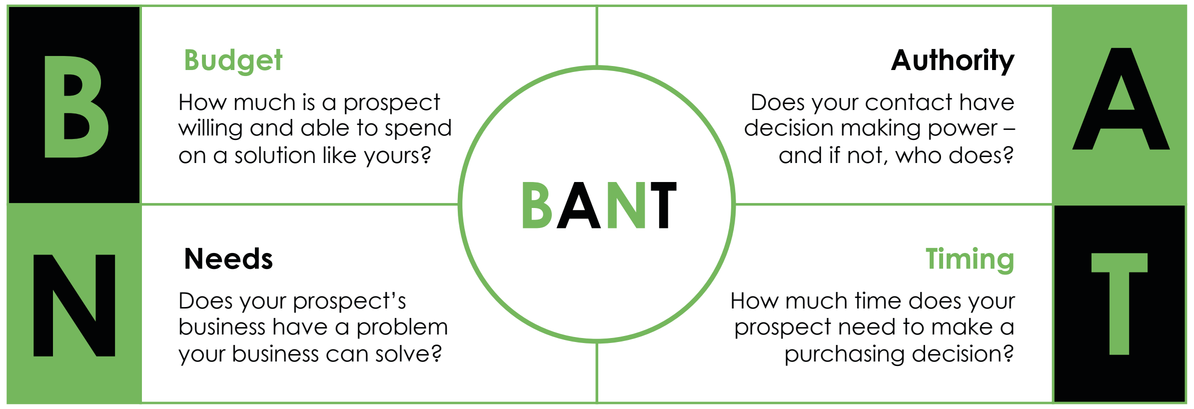
This ensures we can provide ongoing support and keep track of important details.

6. **Wrap up with next steps.**

- Would you like me to send through more info?"
- "Let's get you sorted! Would you like help with finding a stockist [or other relevant specialist] in your area?
- If relevant: "By the way, how did you hear about CUTEK®?"

Qualify with BANT

It is vital to qualify all sales opportunities before we expend any significant effort on customer enquiries. At CUTEK® we have adopted the BANT technique to assist with qualification.



Salespeople frequently miss their sales targets for almost always the same reason - they have spent too much time on opportunities that didn't close. Good qualification reduces this likelihood.

Please refer to the Appendix at the back of this document to see how to implement the full BANT process.

Step 1b: Collate and Input All Leads into CRM

Input Leads Into the CRM

Once a lead has been received and reviewed, it must be accurately logged into the CRM. Proper data entry ensures leads are track-able, actionable, and ready for follow-up.

TIP

- Use custom tags and/or fields to categorise leads efficiently for reporting and segmentation.

Ensuring High-Quality Data in the CRM

Accurate, structured, and complete data is the foundation of a strong sales pipeline. Poor data leads to wasted time, missed opportunities, and ineffective sales strategies. Maintaining high-quality lead data in the CRM allows CUTEK®'s sales team to:

- Improve lead qualification by ensuring the right prospects are pursued.
- Enhance personalisation in outreach by leveraging industry and engagement insights.
- Streamline sales handovers with complete and up-to-date customer records.
- Enable data-driven decision-making with reliable reporting and forecasting.

REMEMBER

'Garbage in, garbage out' (GIGO). Poor-quality data input into CRM will lead to flawed outputs and decisions.

What Constitutes "Good Data"?

Every lead should include accurate and relevant details that help the sales team understand the opportunity and tailor their approach. Key data points to capture include:

1. **Business Information**
   - Industry/Type: Helps tailor product recommendations and messaging (e.g. building, architecture, government).
   - Company Size: Indicates project scale and potential budget.
   - Location: Site-specific needs (e.g. climate considerations for timber protection).
2. **Customer Needs & Pain Points**
   - Current Timber Protection Solutions: Are they already using a competitor's product? If so, which one?
   - Challenges: Common issues include durability concerns, compliance requirements, or maintenance difficulties.
   - Scalability Requirements: Are they looking for a one-off project or an ongoing timber treatment solution?
3. **Decision-Making Insights**
   - Key Decision-Makers: Identify who influences and approves purchasing decisions (e.g. architects, project managers, procurement officers).
   - Buying Criteria: Determine the most important factors (e.g. sustainability, ease of application, cost-effectiveness).
   - Timeline: Understanding urgency helps prioritise follow-ups.

4. **Engagement & Interaction History**
    - Previous Touchpoints: Past engagement with CUTEK® (e.g. sample requests, webinars, LinkedIn interactions).
    - Preferred Communication Method: Email, phone, or in-person meetings.
    - Content Interactions: Downloads, case study views, or website visits.

5. **Competitor Insights**
    - Existing Supplier: Are they currently using a competitor such as Cabot, Intergrain, Osmo, or Organoil?
    - Competitive Advantages: What issues are they experiencing with their current supplier? Where does CUTEK® offer a clear advantage?

Tagging and Segmentation

Once entered, leads should be categorised based on industry, buying stage, and potential value to allow for better follow-ups and reporting.

- **Sales:** High-priority leads should be flagged for immediate outreach.
- **Marketing:** Cold leads can be placed into a nurture campaign managed by marketing. The lead nurture process is to be developed alongside distributors and in alignment with CUTEK®.
- **Disqualified Leads:** Tag appropriately to avoid unnecessary follow-ups.
  Common disqualifiers include:
    - Industry Mismatch
    - No Genuine Need or Interest
    - No Budget or Financial Constraints
    - No Decision-Making Authority
    - Wrong Geographic Region
    - Poor Fit for CUTEK®'s Products
    - No Urgency / Long Sales Cycle
    - Repeatedly Unresponsive Leads

TIPS

- Ensure CRM tags align with sales and marketing workflows to prevent misclassification.
- Verify contact details before saving new entries. Use standard job titles and industry tags (e.g. "Project Manager" instead of "PM"). Cross-check existing accounts to prevent duplicate entries.

Step 1c: Allocate and Assign Leads. Either Automated or Via Sales Manager

Lead Distribution Process

Once leads are logged and segmented, they must be assigned to the appropriate sales representative for follow-up. **This can be done:**

1. Automatically using CRM rules.
2. Manually by a sales manager for high-value or complex leads.

TIP

- Ensure sales reps are notified for immediate follow-up.

Assignment Criteria

Leads should be allocated based on:

- **Industry Fit:** Assign to reps with experience in the lead's industry.
- **Territory Coverage:** Allocate leads based on regional sales assignments.
- **Lead Priority:** High-value leads should be fast-tracked to senior reps.
- **Workload Distribution:** Ensure a balanced workload across the team.

TIP

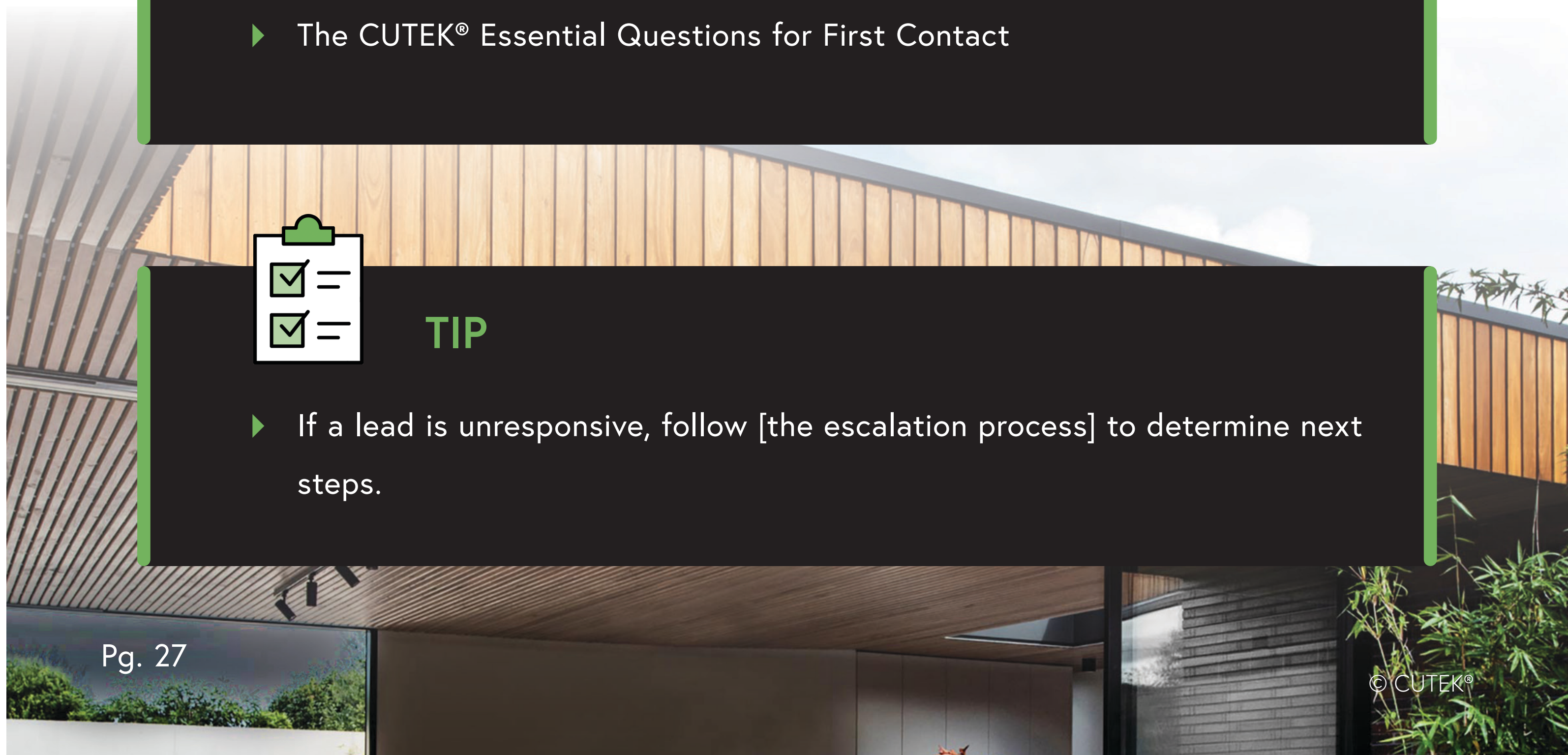
- Use CRM to monitor lead distribution and reassign if needed.

Handoff & Follow-Up Expectations

Once leads are assigned, sales reps must follow up promptly to maintain engagement and ensure opportunities move forward. Sales reps should initiate contact within [24 hours].

Best Practices for Smooth Handoffs:

- Sales managers review lead assignments weekly/monthly.
- Internal notes in CRM provide context for follow-ups.
- Alignment with marketing ensures no lead is lost.



REMEMBER

- The CUTEK® Essential Questions for First Contact

TIP

- If a lead is unresponsive, follow [the escalation process] to determine next steps.

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Stage 2: Making Contact and Understanding the Need in Detail

Overview

Now that leads have been received, qualified, and assigned in Stage 1, the focus shifts to engaging with them effectively. In this stage, the sales team initiates contact, conduct research, and deepen their understanding of the lead's specific needs, challenges, and decision-making process. A strong start ensures tailored conversations that build trust and move the opportunity forward. Effective research and preparation set the foundation for a meaningful first interaction, ensuring sales reps approach conversations with relevant insights and a consultative mindset.

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Steps

2a. Review and Research Assigned Leads.

2b. Develop a Contact Plan for Person-to-Person (P2P) Outreach Based on the Assigned Customer Group.

2c. Make Contact - Person-to-Person. No emails.

CONNECTION

2d. Capture Call Details in CRM With Next Steps—Next Contact, Site Visit, or Follow-up Call. Add Preperation Notes as Needed.

2e. Consolidate Call and Send Follow-up Email.

NO CONNECTION

2f. Send an Acknowledgment Email (Refer to Template). Schedule a Follow-up Call in CRM (1 Business Day).

FOLLOW UP CONNECTION SUCCESSFUL

2g. Capture Call Details in CRM With Next Steps—Next Contact, Site Visit, or Follow-up Call. Add Preperation Notes as Needed.

FOLLOW UP CONNECTION NOT SUCCESSFUL SEND 'OVER TO YOU' EMAIL

2h. Update CRM.

Step 2a: Review and Research Assigned Leads

Effective outreach starts with research. Before making contact, it's important to understand the prospect's requirements, business or industry and potential challenges. A well-prepared approach increases the chances of a productive conversation and ultimately a sale.

Research Process

- Review initial CRM file data thoroughly
- Reach out to key internal contacts who may have insights about the customer
- Gather information about specific customer challenges
- Document all findings in CRM

Leads at CUTEK® typically come from:

- Social Media
- Website Enquiries
- Woodcare forums
- Referrals
- Enquiries (phone or in person)

Understanding where a lead originates from helps tailor the outreach approach. For example, a lead from social media may have engaged with a post about CUTEK®'s superior durability on hardwoods, while a referral may already have some knowledge of CUTEK®'s offerings.

TIP

- Schedule a daily or weekly lead review to ensure timely follow-ups and prioritise high-value opportunities.

Handling Customer Enquiries as Leads

A Day in the Life of a Customer Enquiry:

The CUTEK® Experience

At CUTEK®, every customer enquiry is an opportunity to champion wood, build relationships, and provide world-class solutions. But what does that journey actually look like?

Let's step into the world of customer interactions and explore different paths that an enquiry might take.

Here are some scenarios and actions for from the different customer groups.

Scenario 1: The DIY Enthusiast

1

"Help! My deck is looking worse for wear..."

9:02 AM - First Contact

Jenny, an enthusiastic DIYer, submits a web enquiry: "Hi! I built a deck last year, and it's starting to look faded. I want to restore it, but I'm not sure where to start. What product should I use?"

9:30 AM - First Response

Sam from CUTEK® Customer Service calls Jenny back. He asks about her project, what timber was used, and whether she had coated it previously. Jenny explains she never got around to sealing it (Oops!).

10:00 AM - Tailored Solution

Sam recommends CUTEK® Restore to remove surface greying, followed by CUTEK® Extreme CD50 in a natural or tinted finish. Jenny is excited but worries about the application. Sam reassures her and sends a link to application guides and video tutorials.

2:45 PM - Sticky Spot: Choosing a Colour

Jenny emails back: "I love the idea of a tinted finish, but I have no idea what colour to choose!"

3:00 PM - Solution Delivered

Sam responds promptly: "Great question! I've arranged for sample pots to be sent out so you can test the colours before committing. Would you like some tips on how to apply them?"

Three Weeks Later - Follow-Up

Jenny gets a friendly email from Sam checking in: "Hey Jenny! How did your deck restoration go? Let me know if you need any more help!"

CRM Logging

All interactions, including product recommendations, concerns, and follow-up notes, are logged into the CRM to ensure seamless service if Jenny reaches out again.

Result: Jenny successfully restores her deck and is now a CUTEK® fan for life!

Scenario 2: The Builder Under Pressure

"I need a durable coating for a client's high-end deck... yesterday."

7:45 AM - Urgent Phone Call

Mark, a builder, calls CUTEK® in a rush: "I've got a client with a huge spotted gum deck, and they want a low-maintenance finish that won't peel. What should I use?"

8:00 AM - Expert Consultation

Emma, a CUTEK® timber specialist, takes the call. She asks about the project scope, client expectations, and whether the timber has been pre-treated. Mark needs something quick to apply and easy for his client to maintain.

8:30 AM - Product Recommendation

Emma recommends CUTEK® Extreme CD50 for its deep penetration and dimensional stability benefits. She also suggests CUTEK® Quickclean for pre-application prep. Mark is intrigued but needs reassurance on drying times.

10:00 AM - Sticky Spot: Convincing the Client

Mark calls back: "My client is worried about the oil taking too long to dry. What do I tell them?"

10:15 AM - Solution Delivered

Emma advises: "Because CUTEK® penetrates deeply, it won't crack or peel like surface coatings. It does take longer to fully cure, but your client can use the deck within 24 hours." She also sends case studies of successful high-end projects.

Three Weeks Later - Follow-Up

Mark receives an email: "How did the project go? Let us know if we can assist with future jobs. Also, have you considered joining our Authorised Applicator Program?"

CRM Logging

Mark's project details, product usage, and follow-up status are recorded in the CRM, making future interactions more efficient.

Result: Mark is impressed with the customer support and product performance. He starts using CUTEK® on all his timber projects.

Scenario 3: The Old Customer Who Forgot Their Colour Choice

"I loved my deck colour... but what was it again?"

11:00 AM - Returning Customer Call

David, a past customer, calls in: "I bought CUTEK® a few years ago and I want to recoat my deck, but I can't remember which colour I used. Can you help?"

11:05 AM - Immediate Solution

Thanks to immaculate CRM record-keeping, the CUTEK® team quickly retrieves David's order history and confirms he used CUTEK® Goldtone.

11:10 AM - Customer Delight

David is amazed: "Wow, I didn't expect you to have that on file! This makes everything so much easier."

Result: CUTEK®'s attention to detail and long-term customer care keeps David coming back.

Scenario 4: The Architect Who Returns Years Later

"I specified CUTEK® years ago… and I'm back!"

3:30 PM - Unexpected Call

Michael, an architect, calls: "I specified CUTEK® on a project five years ago, but I haven't used timber much since then. Now I have a new project and need advice—do you still have my old specs on file?"

3:35 PM - The Magic of CRM

The CUTEK® team quickly pulls up his previous specifications, project notes, and any past questions he had.

3:45 PM - Rebuilding the Relationship

Michael is blown away: "I can't believe you remember all this! This saves me so much time. I'll be specifying CUTEK® again."

Scenario 5: The Specialist Enquiry – A Complex R&D Case

5

"We need a custom solution for an engineered wood project."

James, a mass timber engineer, contacts CUTEK® with a highly specialised enquiry:

"We're developing a new engineered wood product that requires a timber coating to meet international compliance standards. Can you help?"

Initial Consultation – Understanding the Challenge

A senior CUTEK® specialist takes the enquiry, gathering critical details about:

- The specific wood type and treatment process involved
- The performance expectations for durability, weathering, and aesthetics
- Compliance and certification needs for different global markets
- Application process concerns, ensuring the product integrates seamlessly into their production line

It quickly becomes clear that this enquiry requires in-depth R&D involvement. The specialist sets expectations with James, explaining that complex formulations and compliance solutions often require weeks or months of development, testing, and validation.

Engaging the R&D Team – A Collaborative Effort

James' enquiry is formally handed over to CUTEK®'s R&D department, which may involve:

- Consultation with international head office teams to align technical resources
- Assessing existing formulations to see if current technology meets the requirements
- Developing a new or modified solution if necessary

To ensure accurate testing, James ships product samples to the CUTEK® R&D lab, while his team simultaneously conducts on-site testing with off-the-shelf CUTEK® products.

Weeks of Iteration – Testing and Validation

The process unfolds over multiple weeks or even months, depending on:

- The complexity of the required modifications
- Testing cycles, including application, performance durability, and compliance verification
- Regulatory documentation and certification processes

Throughout this period, CUTEK® maintains open communication, providing:

- Regular updates on research progress and expected response times
- Preliminary findings to keep the customer engaged and involved
- Transparent discussions about formulation tweaks, testing requirements, and next steps

Sticky Spot: Compliance Challenges

5

James' company requires certifications for both European and North American markets, which means extensive compliance testing. He reaches out:

"Can you provide verified test results and documentation to support certification?"

CUTEK®'s R&D team:

- Compiles existing performance data
- Determines if additional testing is required
- Works with certification bodies if necessary to facilitate approvals

Final Solution – Success After Rigorous Testing

After extensive back-and-forth collaboration, CUTEK® provides a validated solution that meets James' needs. His team confirms that the customised formulation integrates perfectly with their engineered wood process.

CRM Logging & Long-Term Relationship Building

Every detail of the project—including formulation tweaks, test results, and compliance documentation—is logged in the CRM. This ensures:

- Seamless future support if James needs further adjustments
- A documented history of CUTEK®'s collaboration with his company
- A strong foundation for ongoing innovation partnerships

Result: James is impressed by CUTEK®'s technical expertise, responsiveness, and commitment to getting it right. His company now considers CUTEK® its go-to coating partner for engineered timber projects worldwide.

The CUTEK® Customer Journey

From the DIYer to the high-level R&D case, every enquiry is unique. But one thing remains the same: CUTEK® delivers expert guidance, practical solutions, and outstanding customer care at every step.

By ensuring that all interactions are logged in the CRM, we create a seamless customer experience, build stronger relationships, and provide even better service in the future.

And that's what makes us true Wood Champions.

Step 2b: Create a Contact Plan for P2P Based on the Customer Group

A structured contact plan ensures a focused and strategic approach. Our target customer types have been grouped into Group A and other groups have been identified to ensure appropriate engagement strategies:

Customer Groups for Engagement

Group A (Customer Types):

- Wood ((Timber) Manufacturer)
- Architects
- Government Projects
- Builders, Deck Restorers, Applicators

Group B:

- Retailers
- Distributors
- Stockists
- Resellers

Group C:

- End Customers and Consumers

Tailored Messaging

- Construction and Building Industry: Respond better to case studies showcasing real-world project success.
- Architectural and Design Firms: Engage more with ROI-driven discussions highlighting long-term cost savings and performance benefits.
- Trade Professionals and Contractors: Prefer hands-on product demos to see the product in action.

TIP

- Adjust messaging accordingly based on the audience and their group classification.

Step 2c: Make Contact - Person to Person (No Emails)

The first point of contact with a customer is crucial—it sets the tone for the entire relationship. Building rapport from the start is essential, as the way a customer feels about the initial interaction will shape their perception of CUTEK® as a brand.

Building Rapport Phone Tips

Building rapport through a telephone call is essential for creating a positive connection with potential customers. Below are some techniques to help establish rapport:

- **Smile Through the Phone:** Even though they can't see you, they can often hear a smile in your voice. Smiling while you talk can help create a warm and friendly tone.
- **Introduce Yourself Clearly:** Start the call by introducing yourself and Excision. Use a clear and confident tone to convey professionalism.
- **Use the Prospect's Name:** Address the prospect by their name throughout the conversation. This personal touch makes them feel valued and acknowledged.
- **Active Listening:** Pay close attention to what the prospect is saying. Nodding (even though they can't see it) and verbal cues like "I understand," or "that makes sense" show that you're engaged.
- **Ask Open-Ended Questions:** Open-ended questions encourage the prospect to share more about their needs and preferences. This helps you best direct their enquiry to the right person. Open ended questions cannot be answered by 'Yes' or 'No', and typically start with 'Who', 'What', 'When', 'Why', 'How'.
- **Use Mirroring:** Match the pace, tone, and energy of the prospect's speech. This can subconsciously make them feel more comfortable talking to you.
- **Respect Their Time:** Begin by asking if it's a good time for them to talk. Also, let them know the approximate duration of the call.

Some leads may be ready to take the next step immediately, while others will need multiple touchpoints before moving forward. The goal at this stage is simply to make a strong first impression and lay the foundation for a productive relationship.

Step 2d: Log Call Details in CRM with Next Steps

A successful call isn't just about what's discussed—it's about what's recorded. CUTEK® uses CRM to log lead interactions, ensuring that all important details are accessible for future follow-ups.

What to Include in the CRM

- Key discussion points and any concerns raised
- Agreed-upon next steps, such as scheduling a follow-up or arranging a demo
- Additional details that could assist in future conversations

Follow-up Email Components

- Thank you message
- Confirmation of key conversation points
- Additional information as requested
- **Clear next steps, including:**
  - Follow-up call scheduling
  - Onsite visit arrangements
  - No further action (if resolved during call)
  - Any other agreed-upon actions

TIP

- Proper CRM documentation prevents miscommunication, strengthens internal collaboration, and ensures no opportunity slips through the cracks.

Step 2e: Consolidate Call and Send Follow-Up Email

Following up promptly ensures the conversation remains fresh in the lead's mind. Each customer category requires specific preparation for the next engagement.

Core Mandatory Questions

These questions have been tailored for each customer type and will enable effective preparation prior to next engagement.

A. Timber/Wood Manufacturer

At CUTEK®, we believe in partnering with businesses that champion wood. Our goal is to support timber manufacturers by providing innovative solutions that enhance their products, streamline their processes, and help them succeed.

This follow-up call is about getting to know their business, their challenges, and how we can genuinely add value.

1. **Learn about their business**

   "We'd love to understand more about your business. Can you tell me about the types of wood you manufacture and supply?"

   - What species of timber do you work with?
   - Are your products used in specific applications (e.g. decking, cladding, structural)?
   - Do you supply domestically or internationally?

2. **Discuss their current timber treatments**

   "Are you currently pre-oiling or pre-coating any of your timber before it goes to market?"

   - **If yes** → "What products are you using, and how are they working for you?"
   - **If no** → "Is pre-oiling something you've considered, or would you be open to learning more about its benefits?"

Key Insight: This helps us understand their needs and whether CUTEK® can offer a better solution or improve their process.

3. **Understand why they reached out**

   "What led you to contact CUTEK®? Was there a particular challenge or opportunity you were looking to explore?"

   - Are they looking for a better-quality product?
   - Do they need more technical support or expertise?
   - Are they exploring new ways to add value to their timber?

4. **Position CUTEK® as a partner, not just a supplier**

   "We'd love to find ways to support your business and help you achieve your goals. What are some key challenges you're facing right now?"

   - Are they dealing with inconsistencies in their coatings?
   - Do they want a product that enhances durability and performance?
   - Are they looking to increase efficiency in their production process?
   - Are they looking to increase their profit margins in a very competitive industry?

Wood Champions Mindset: This is where we show that CUTEK® is not just a product—it's a partner in making wood an easier and more desirable material to use.

5. **Offer a site visit to strengthen the partnership**

   "We'd love to get a firsthand look at your operations so we can better understand your needs. Would it be helpful to have one of our timber specialists visit your site?"

   - **If yes** → Schedule a time that works for them.
   - **If no** → Offer an alternative (e.g. a virtual call, sending them samples, or setting up a technical discussion).

Why this matters: A site visit builds trust, allows us to give tailored recommendations, and shows that CUTEK® is committed to helping their business thrive.

Above all, remember:

- We're here to help, not just sell. Approach every conversation with a solutions-first mindset.
- Listen first, then offer guidance. Every manufacturer has unique needs—let's understand them before suggesting solutions.
- Think long-term. We're not just providing a coating; we're offering a better way to protect, enhance, and sell timber.
- Log everything in the CRM! The more details we capture now, the better we can serve them today and in the future.

B. Architects

At CUTEK®, we love partnering with visionary architects who bring timber to life in their projects. Our goal is to be a trusted resource, helping architects confidently specify timber by providing innovative solutions and expert advice that can benefit, enhance and protect their designs.

This follow-up call is about understanding their needs, addressing any concerns about timber, and showing how CUTEK® can support their creative vision.

1. **Learn about their use of timber**

   "Do you currently use wood/timber in any of your projects?"

   - **If yes** → "What type of projects do you usually work on?"
     - Residential, commercial, high-end custom, sustainable design, etc.
   - **If no** → "Is timber something you'd like to incorporate more, or are there barriers preventing you from specifying it?"

Key Insight: This helps us understand how timber fits into their work and whether we need to educate, reassure, or provide new solutions.

2. **Understand why they reached out**

   "What prompted you to contact CUTEK® today?"

   - Are they looking for a specific timber coating solution?
   - Do they need technical guidance on timber durability, performance, or compliance?
   - Are they working on a major project where timber plays a key role?

3. **Address any concerns about specifying wood**

"Do you ever have hesitations when specifying timber? We're a solutions-based company, and we'd love to understand any concerns you may have so we can help you feel confident showcasing timber in your upcoming projects."

Common concerns we can help with:

- Durability and longevity (weathering, dimensional stability, maintenance, protection)
- Sustainability & Eco-certifications
- Colour stability and design flexibility
- Protection during construction when exposed to the elements
- Client misconceptions about timber
- Highlighting and enhancing the natural beauty of their wood selection (not masking it)

Wood Champions Mindset: This is our chance to position timber as the superior, sustainable choice—and show architects how CUTEK® makes it easier to specify and maintain.

4. **Offer a face-to-face consultation**

"Can we come out to your firm to chat further about your current projects and explore ways we can help?"

- **If yes** → Schedule a meeting to discuss specific projects.
- **If no** → Offer an alternative (e.g. virtual consult, sending samples, technical resources)

Why this matters: Architects value technical expertise—a visit allows us to provide tailored solutions and build stronger relationships.

5. **Introduce CUTEK®'s bespoke solutions (if relevant)**

"Did you know that CUTEK® can offer bespoke solutions for major projects—We'd love to collaborate with you to understand your project and help bring your vision to life."

- Are they looking for a particular aesthetic or feature in their coating?
- Do they work on projects where sustainability and compliance are key factors.

Key Insight: Architects love customisation—showing that CUTEK® can help them achieve unique finishes is a powerful way to build trust.

6. **Offer a CPD Presentation (if relevant)**

"By the way, do you (or anyone in your firm) need to accrue CPD points? We have a registered CPD presentation designed to increase understanding and awareness of the incredible features of wood for building projects."

- **If yes** → Book a CPD session.
- **If no** → Still mention it as a resource available to them.

Why this matters: CPD presentations help position CUTEK® as an educational partner—not just a product supplier.

Above all, remember:

- We're here to support, not sell. Architects want trusted partners who enhance their designs—not push products.
- Listen and guide. Every architect's needs are different—understanding their process helps us provide better solutions.
- Think big-picture. We're not just talking about a coating; we're helping elevate the use of timber in modern architecture.
- Log everything in the CRM! Capturing key details now ensures stronger follow-ups and long-term relationships.

C. Government Sales (Government-Funded Infrastructure Projects)

Government infrastructure projects often have strict requirements, compliance needs, and sustainability goals. At CUTEK®, we position ourselves as trusted partners who can provide long-lasting, compliant, and environmentally responsible timber protection solutions that meet these demands.

This follow-up call is about understanding their project scope, budget considerations, compliance requirements, and how we can support them with expert solutions.

Identify their role and project **involvement**

"Can you tell me a bit about your role and how you're involved in this project?"

- Are they a specifier, project manager, procurement officer, or consultant?
- Are they making product decisions or do they need technical recommendations to pass along?

> Key Insight: Knowing their role helps us tailor our conversation to match their level of influence and project needs..

1. **Learn about the project scope**

"What government project are you currently working on?"

- What type of infrastructure is it? (e.g. bridges, boardwalks, public spaces, parks, marine structures)
- Is timber being used for structural purposes, aesthetic features, or both?
- What timber species are they using?

> Why this matters: Different applications require different durability and coating considerations.

2. **Understand compliance and regulatory needs**

"Are there specific compliance or sustainability requirements that need to be met for this project?"

- Are they working within Australian Standards (AS/NZS), NCC/BCA compliance, or specific government procurement policies?
- Do they need slip-rated coatings for pedestrian areas or public walkways?
- Is there an environmental sustainability goal (e.g. carbon reduction, VOC limits, Eco-certified products)?

> Key Insight: Government projects must often meet strict performance, durability, and environmental standards—CUTEK® can provide solutions that align with these regulations.

3. **Address potential challenges and concerns**

"Are there any concerns or challenges with using timber in this project?"

Common concerns we can help with:

- Durability in harsh conditions (marine, high-traffic, extreme weather exposure)
- Easy maintenance and long-term performance (minimising ongoing costs)
- Slip resistance for public safety
- Sustainability goals and Eco-certifications
- Budget considerations and achieving the best value
- Protecting the capital investment (ensuring timber longevity so the original investment lasts longer and remains sustainable)

> Wood Champions Mindset: This is where we position timber as a practical, durable, and sustainable material—and CUTEK® as the solution provider that makes it easy to maintain and protects long-term investment.

4. **Offer technical support and site consultation**

"Would it be helpful to arrange a meeting or site visit with our technical team to go through product suitability and compliance?"

- **If yes** → Schedule a meeting with the appropriate expert.
- **If no** → Offer an alternative (e.g. sending technical recommendations or discussing on a follow-up call).

> Why this matters: Government projects require expert insights and tailored solutions—offering technical support upfront helps position CUTEK® as a trusted industry partner.

5. **Discuss procurement and next steps**

"Would you like more information on procurement options, specifications, similar project case studies or technical recommendations to support your selection process?"

- Do they need budget-friendly options without compromising on quality?
- Should we provide additional proof, compliance data, or test results to assist in specifying CUTEK®?
- Would they like samples or product demonstrations for further evaluation?

Why this matters: Understanding their procurement needs ensures we can help navigate the approval process and provide any required data. Make sure to log any documentation or compliance needs in the CRM for effective follow-up.

Above all, remember:

- Speak their language. Government projects focus on compliance, long-term value, and sustainability—frame our solutions in these terms.
- Position CUTEK® as an easy-maintenance, high-performance choice. Show how we reduce long-term costs and enhance durability.
- Emphasise protection of the capital investment. Well-maintained timber means the original investment lasts longer and is more sustainable than replacing it.
- Log everything in the CRM! Government sales often involve multiple stakeholders and long timelines—detailed records ensure continuity and better service.

D. Builder / Deck Restoration Company / Applicator

Builders, deck restoration companies, and applicators are hands-on professionals who need practical, high-performance solutions that help them deliver great results efficiently. At CUTEK®, we're here to make their job easier, help them achieve the best timber outcomes, and build a long-term partnership.

This follow-up call is about understanding their business, learning what challenges they face on the job, and showing how CUTEK® can help them work smarter and deliver exceptional results.

1. **Learn about their business**

"Tell me a bit about your business. What type of work do you specialise in?"

- Do they focus on new builds, renovations, decks, outdoor structures, commercial projects, or restoration work?
- What types of timber do they commonly work with?
- Do they have a preferred finishing process, or are they open to new methods?

Key Insight: Understanding their business helps us offer relevant solutions and position CUTEK® as a go-to resource.

2. **Understand why they reached out**

"What led you to contact CUTEK® today?"

- Are they looking for a better timber protection solution?
- Has CUTEK® been specified on one of your projects?
- Do they need help troubleshooting a specific project or issue?
- Are they exploring product options for a new job?

Why this matters: This helps us tailor our recommendations and offer solutions that improve their workflow and results.

3. **Discuss common timber challenges they face**

"What are some of the biggest challenges you face when working with timber?"

Common challenges we can help with:

- Weather exposure and durability
- Timber movement, cracking, and splitting
- Uneven coating results or difficult application processes
- Customer education—explaining maintenance and product performance
- Finding an easy-maintenance solution that customers will follow through with
- Troubleshooting colour options and ensuring the best choice is selected for the project
- Providing product samples for themselves or their customers to test

Key Insight: Builders and applicators want reliable, predictable results—CUTEK® can help by making timber protection easier and more effective.

4. **Position CUTEK® as the easiest and most effective solution**

"Have you worked with CUTEK® products before?"

- **If yes →** "How has your experience been? Any feedback or areas we can support you better?"
- **If no →** "CUTEK® is designed to be an easy-maintenance, deep-penetrating oil that enhances durability and makes your projects last longer. Would you like to learn more about how it compares to what you're using now?"

Wood Champions Mindset: CUTEK® doesn't just coat timber—it protects and enhances it from within, making their work stand the test of time.

5. **Offer technical support and training**

"Would you be interested in a demonstration or some guidance on best application practices?"

- **If yes →** Arrange a site visit, training session, or video demo.
- **If no →** Offer practical resources (e.g. application guides, videos, or case studies).

Why this matters: Many builders and applicators stick with what they know—but once they see how CUTEK® works, they're much more likely to switch.

6. **Introduce CUTEK®'s trade benefits (if relevant)**

"Did you know that CUTEK® offers trade accounts and volume discounts for regular users?"

- Are they interested in better pricing for ongoing purchases?
- Would they like priority access to new product info, training, or project support?
- "If you meet the right criteria, we can also connect you to potential customers through our authorised applicator search on our website."

Key Insight: Builders and applicators appreciate cost efficiency and support—positioning CUTEK® as their preferred supplier strengthens loyalty.

7. **Wrap up and establish next steps**

"Would you like us to send over pricing, product info, or arrange a sample for your next project?"

- Do they need pricing or ordering information?
- Would they like a sample to test on an upcoming job?
- Are they interested in ongoing support, such as training or trade benefits?

Why this matters: Builders and applicators work fast—if we can make their lives easier right now, they're more likely to choose CUTEK®.

Above all, remember:

- Be practical and solutions-driven. Builders want real-world solutions that help them work smarter.
- Make it easy. Show how CUTEK® is easier to apply, maintain, and sell to customers than alternative products.
- Position CUTEK® as a long-term partner. We're not just offering a product—we're helping them build better, longer-lasting projects.
- Log everything in the CRM! Capturing details ensures better follow-ups and helps us build strong trade relationships.

E. DIY Customers

DIY customers are often enthusiastic about their projects but may not have the same level of technical knowledge as professionals. They need clear, simple guidance to feel confident in using CUTEK® and achieving great results.

At CUTEK®, we empower DIY customers by making timber care easy, effective, and rewarding. This follow-up call is about understanding their project, answering their concerns, and ensuring they have everything they need to succeed.

1. **Learn about their project**

   "Tell me a bit about your project! What are you working on?"

   - Are they working on a deck, outdoor furniture, cladding, pergola, fencing, or another timber structure?
   - What type of timber are they using? (Species, New or weathered timber?)
   - Is this a first-time timber project, or have they worked with wood before?

Key Insight: Knowing their project helps us offer tailored advice and guide them toward the best CUTEK® solution.

2. **Understand why they reached out**

   "What led you to contact CUTEK® today?"

   - Are they looking for a timber protection product for the first time?
   - Have they heard about CUTEK® and want to learn how to use it?
   - Are they trying to fix or restore an existing timber surface?
   - Do they need help choosing a colour or product?

Why this matters: DIYers often seek assurance and education—this helps us support them with the right information.

3. **Address common DIY concerns**

   "Do you have any concerns or questions about your timber project?"

   Common challenges we can help with:

   - How to properly prepare timber before coating
   - Choosing the right CUTEK® colour tone or going natural
   - How many coats they need and how much product to buy
   - Best way to apply CUTEK® for an even, long-lasting finish
   - How to maintain timber after coating to keep it looking great

Key Insight: DIYers want step-by-step guidance—we can provide simple, clear answers to ensure they feel confident.

4. **Guide them through the application process**

   "Would you like some quick tips on the best way to apply CUTEK® for your project?"

   - **If yes** → Offer a simple step-by-step guide based on their project.
   - **If no** → Direct them to CUTEK®'s website, instructional videos, or printed guides.

Why this matters: Many DIYers worry about making mistakes—giving them practical guidance reduces hesitation and ensures success.

5. **Offer product samples and colour testing**

   "Would you like to try a sample before committing to a full purchase?"

   - DIYers often want to see how a colour will look on their timber before making a final decision.
   - Offer samples or direct them to CUTEK®'s colour visualisation tools.

Key Insight: Samples give DIYers confidence in their colour choice and help prevent dissatisfaction.

6. **Set them up for long-term success**

   "Would you like some tips on how to maintain your timber over time?"

   - Explain how CUTEK® naturally weathers and when to reapply for ongoing protection.
   - If applicable, suggest CUTEK® Prepare products to clean and restore timber as needed.

Wood Champions Mindset: A well-maintained timber project lasts longer, looks better, and protects their investment.

7. **Wrap up and offer ongoing support**

   "Would you like us to send you a link to our website where you can find application guides, product recommendations, and instructional videos?"

   - Would they like help with ordering or finding a retailer?
   - Offer ongoing support—let them know they can reach out anytime with questions.

Why this matters: Many DIYers need reassurance and a point of contact—offering support builds trust and encourages them to return for future projects.

Above all, remember:

- Keep it simple. DIY customers want clear, practical guidance—no complex terminology.
- Be encouraging. Many are nervous about making mistakes—assure them that CUTEK® is easy to use and forgiving.
- Position CUTEK® as a long-term solution. Help them see that proper timber care means less work in the future.
- Log everything in the CRM! Capturing their project details ensures better follow-ups and a positive customer experience.

Follow-up Email Best Practices

- Recap the main discussion points
- Confirm the next steps
- Provide any promised resources
- Include a clear call to action

TIMING

- Send the follow-up within [24 hours] to improve response rates and keep the momentum going.

Step 2f: (No Connection) Send an Acknowledgment Email

Not every call will connect, but every outreach attempt should be logged. When a lead doesn't respond, CUTEK®'s standard acknowledgment email ensures they are aware of the outreach attempt.

Next Steps

- Schedule a follow-up call in the CRM at an appropriate timeframe. Use your discretion to pick a strategic follow-up timeframe that isn't intrusive to the customer.
- If the lead remains unresponsive, adjust the timing or switch to a different outreach method (e.g. LinkedIn).

TIP

- If a lead has engaged with CUTEK®'s content previously, reference this in the email to increase the likelihood of a response.

Step 2g: (Follow-Up Connection) Log Call Details in CRM

When a follow-up call successfully connects, logging it properly is key. Leads that require multiple touchpoints often indicate a high-consideration purchase, meaning tracking their journey in the CRM is crucial.

What to Update in CRM

- What was discussed and any objections raised.
- Updated lead status (e.g. warm lead, high-priority, scheduled demo).
- Any competitor mentions that could help refine CUTEK®'s sales positioning.

Step 2h: Update CRM

Keeping the CRM up to date isn't just a task—it's a strategic necessity for ensuring leads move efficiently through the sales pipeline. Every interaction, status change, and next step should be logged to provide full visibility across the team.

TIP

- A well-maintained CRM helps drive better sales decisions and increases conversion rates.

Stage 3: Engage and Offer Solutions Stage Overview

Overview

This stage focuses on advancing opportunities through structured engagement, solution-based discussions, and strategic follow-ups. The objective is to deepen conversations, reinforce value, and guide leads towards a decision.

At this stage, the sales team must ensure that each interaction progresses the lead by maintaining momentum, addressing concerns/objections, and providing tailored recommendations.

A consultative approach is key—focusing on how CUTEK®'s solutions directly solve the lead's challenges.

Steps

3a. Prepare for Customer Engagement Based on Group Type and Agreed Approach.

3b. Complete Engagement.

3c. Update CRM with Suggested Solutions, Next Steps, and Group Type.

Step 3a: Prepare for Customer Engagement Based on Group Type and Agreed Approach

A strong engagement begins with thorough preparation. Before reaching out, review the customer's CRM entry to ensure your approach aligns with their group type and previous interactions.

Key Preparation Steps

- Review CRM records for past conversations, objections, and touchpoints
- Define the objective of the engagement (e.g. discovery call, proposal discussion)
- Gather supporting resources, such as case studies or pricing details

Preparation by Engagement Type

For Site Visits:

- Ensure all relevant point of sale materials are prepared
- Bring appropriate product samples
- Review site-specific requirements (e.g. safety equipment)

For Follow-up Calls:

- Have relevant system tabs open before the call
- Review previous conversation notes
- Prepare specific talking points based on last interaction

TIP

- Tailor your approach based on the customer's industry and challenges.

Step 3b: Conduct Customer Engagement

Approach every conversation as a two-way discussion rather than a sales pitch. The goal is to understand the customer's needs and position CUTEK® as the best solution.

How to Guide the Discussion

- Ask insightful questions to uncover the customer's priorities
- Position CUTEK®'s solution by focusing on value/problems solved rather than just features
- Summarise key discussion points and agree on next steps

Engagement Approach Based on Customer Type

The method of engagement should align with both the customer category and practical accessibility. For Group A (large clients), prioritise face-to-face meetings where possible to build stronger relationships and demonstrate commitment. If distance is a factor, conduct meetings via video conference (Teams) to maintain personal connection while enabling screen sharing and detailed discussions.

For end users, a combination of phone calls and email communication typically works best – use phone calls for initial discussions and detailed explanations, followed by emails to document agreements and share specific information. This flexible approach ensures each customer receives appropriate attention while maintaining efficiency in our communication methods.

Potential Engagement Outcomes:

- Specification identification and documentation
- Scheduled follow-up check-in
- Development of ongoing support plan

Handling Objections

In sales, not every customer will immediately agree with our initial approach, and while there seem to be countless ways for a customer to say "no," most objections fall into just three or four main categories like price, time, and decision-making authority.

When it comes to CUTEK® specifically, there are effective ways to address these common concerns. For performance questions, sharing our testing data and real-world examples is key, letting successful installations tell the story while the science behind our deep penetration technology backs up every claim.

If customers find the application process daunting, it's important to break it down simply by walking through the two-step process and mentioning our support team's guidance, as customers appreciate knowing help is available when they need it.

When cost comes up, the focus should be on long-term value, highlighting how the spread rate and long-term easy maintenance deliver real savings, supported by actual customer examples of maintenance cost reductions. Price objections are almost guaranteed to arise so you can prepare for them.

Another long-term value we provide is the protection of the initial large capital investment (the wood). Our products deliver superior long-term wood protection, meaning the customer will have much less (if any) need to replace the original wood on their project if they keep it properly maintained with CUTEK®.

> **For example:**
> The Customer may say.
> "You're too expensive. I can get a similar product for less from your competitor."
> **Approach:**
> Shift focus to value rather than price. Use data or case studies to highlight ROI (Return on Investment) and long-term benefits.

Objections aren't roadblocks; they're stepping stones to better conversations. By preparing thoughtful responses and approaching each objection as an opportunity to build trust and showcase value, you can transform resistance into rapport. Remember, the key lies in preparation, curiosity, and aligning your strategy with your authentic approach. Every objection you overcome brings you one step closer to closing with confidence.

Trial Closing

A successful trial close helps gauge customer interest without pushing for commitment. Start with natural questions like "How do you see CUTEK® fitting into your current projects?" or "When would you ideally want to begin protecting your timber?" These open-ended queries encourage honest feedback while respecting the customer's pace.

Key Questions

- "How do you feel about what we have discussed so far?"
- "Does this solution align with what you were envisioning?"
- "Level with me... where abouts are you sitting at the moment?"

Listen carefully for hesitation, as this often signals unspoken concerns. Some customers need technical details, while others prefer focusing on practical implementation—let their interests guide you. Keep focused notes for follow-up, always matching your approach to their specific timeline and needs.

TIPS

- Share relevant case studies that mirror the customer's industry or situation to build credibility.
- Summarise key discussion points throughout the conversation to ensure mutual understanding and demonstrate attentiveness.
- Create a sense of partnership by discussing long-term support and maintenance options beyond the initial purchase.
- Use strategic pauses after key points to allow the customer time to process information and formulate questions.
- Schedule specific follow-up touchpoints before ending the conversation to maintain momentum.

Step 3c: Update CRM with Suggested Solutions, Next Steps, and Group Type

After the engagement, recording accurate details in CRM is essential for tracking progress and ensuring smooth follow-ups.

What to Update

- Summary of key discussion points
- Next steps agreed upon
- Lead group type (update if new insights suggest a different priority level)
- Required internal handoffs or collaborations

Internal Collaboration Requirements

Cases may need to be escalated or shared with:

- Your Distribution Licence Holder
- CUTEK® Head Office
- Marketing Department
- Technical Specialists

All handoffs should be clearly documented with specific requirements and timelines.

TIP

- Offer additional resources post-call, such as industry reports or demo links, to provide further value and keep the customer engaged.

Stage 4: Sowing & Growing

Overview

This stage focuses on strengthening relationships with existing customers while strategically developing new business opportunities. The goal is to nurture long-term engagement, identify growth potential, and position CUTEK® as an ongoing partner rather than just a provider.

Steps

4a. Who Are We Serving? Identify and Nurture Existing Customers Based on Group Type.

4b. Planting the Seed. Develop an Action Plan for New Business Opportunities.

Step 4a: Identify and Nurture Existing Customers Based on Group Type

Maintaining strong relationships with existing customers is crucial for long-term success. This step focuses on engagement strategies that strengthen partnerships, drive retention, and create new opportunities.

Approach Based on Customer Type

- **Active, High-Value Customers:** Prioritise personalised check-ins and proactive discussions.
- **New or Recently Onboarded Customers:** Focus on helping them maximise their current solutions.
- **Inactive or Disengaged Customers:** Reconnect by offering relevant updates or new solutions.

TIP

- Customers who receive ongoing value are more likely to renew, refer, and invest in additional services.

Step 4b: Develop an Action Plan for New Business Opportunities

New business requires a clear, structured approach. Prioritise prospects based on industry trends, past inquiries, and alignment with CUTEK®'s core offerings.

Plan a Personalised Approach

- Choose the best entry point (e.g. shared industry challenge, case study).
- Ensure messaging aligns with the prospect's business stage and priorities.
- Have supporting materials ready, such as whitepapers or success stories.

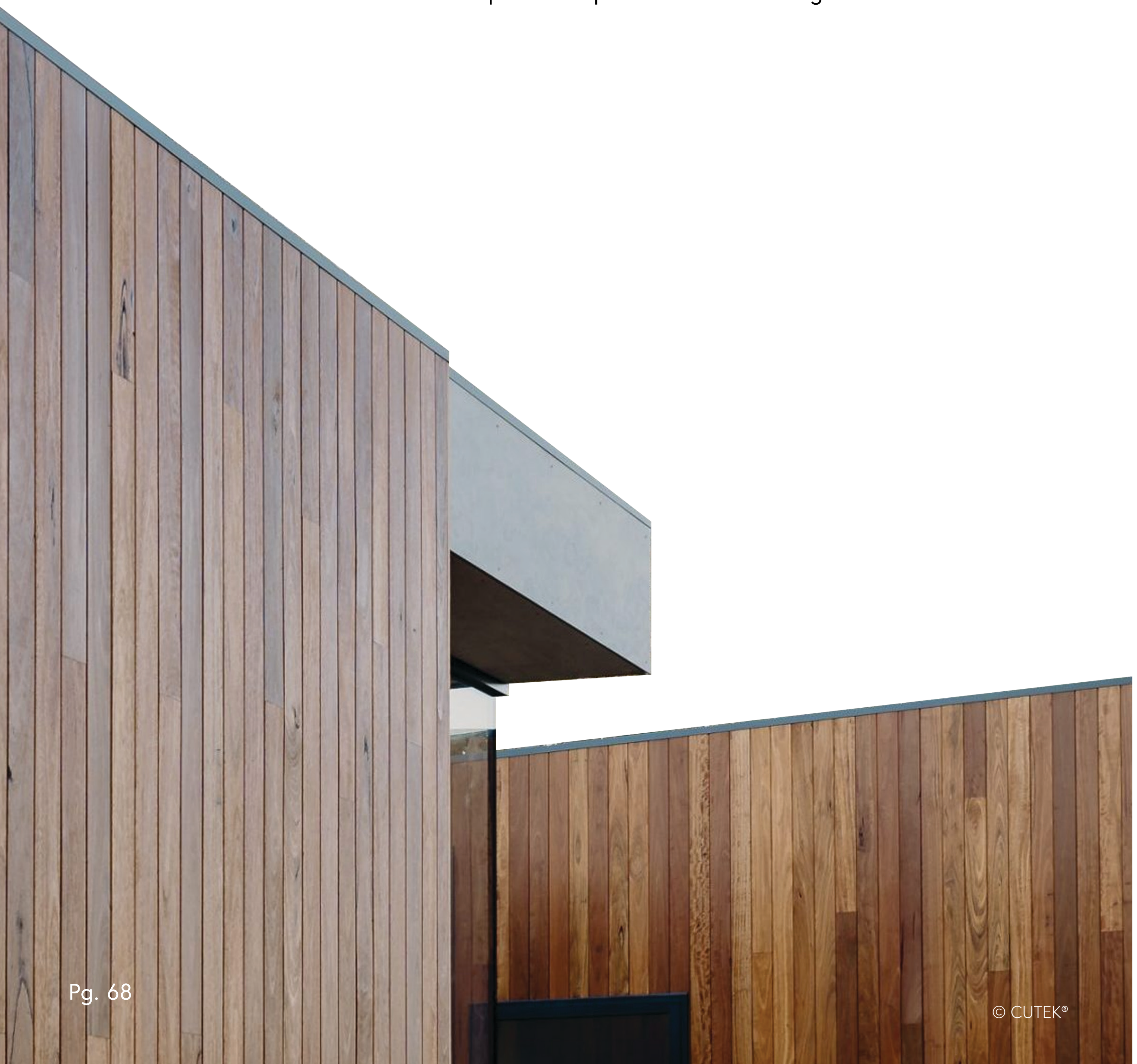
TIP

- Early-stage engagement should position CUTEK® as a trusted advisor, not just another vendor.

Stage 5: Sustaining & Nurturing

Overview

This stage focuses on maintaining and strengthening established customer relationships through ongoing support, proactive engagement, and value-added services to ensure long-term success. By consistently monitoring customer satisfaction, identifying growth opportunities, and delivering excellent account management, sales teams can foster customer loyalty, generate recurring business, and create advocates for CUTEK®'s solutions. This stage establishes a framework for sustainable partnerships that drive mutual growth and success.



Steps

5a. Create Global Strategies.

5b. Develop Strategic Tasks by Customer Type.

Sustaining and Nurturing relationships for all customer groups is an important step to building lifetime customers and advocates of CUTEK® products.

5a. Create Global Strategies

Personalised Customer Engagement

Building meaningful relationships starts with understanding each customer's unique needs. Regular check-ins through calls or visits help maintain strong connections and allow us to stay attuned to evolving project requirements.

Our approach includes:

- Tailoring solutions for both DIY enthusiasts and commercial clients
- Tracking interactions through CRM to enhance future engagements
- Following up after major projects to gather insights and maintain connections

Educational Support & Thought Leadership

Sharing knowledge builds trust and positions CUTEK® as an industry leader. We achieve this through workshops and webinars that demonstrate timber protection techniques and environmental impact considerations. Technical resources like brochures and videos provide practical, real-world advice that customers can implement immediately.

Community and Environmental Involvement

- Supporting timber industry events that align with our values
- Launching initiatives to showcase the beauty of well-maintained timber
- Partnering with environmental organisations for forest preservation
- Creating educational content about sustainable timber practices

Our involvement extends beyond traditional business boundaries, fostering genuine connections within the broader timber community.

Customer Service Excellence

At the heart of our service approach lies proactive problem-solving. Staff training focuses on anticipating potential timber protection issues before they develop into problems. Through dedicated support lines and regular feedback collection, we ensure both professionals and DIYers receive the assistance they need when they need it.

Building Long-Term Partnerships

Success in partnership building comes through:

- Introducing loyalty programs that truly reward commitment (e.g. Authorised Applicator Program, Find a Reseller (website), price points for volume resellers)
- Co-developing case studies with commercial clients
- Establishing meaningful architect and builder alliances
- Co-promoting key wood champion businesses

We approach these partnerships as opportunities for mutual growth, moving beyond traditional vendor-client relationships to create lasting collaborative bonds. Our co-branded marketing initiatives and shared project successes demonstrate the value of these deeper connections.

5b. Develop Strategic Tasks by Customer Type

Here are some specific tasks that can be carried out per customer group to support the global strategies listed previously.

1. Builders & Architects (Technical expertise & industry partnership focus)

Tasks:

- **Host Educational Workshops:** Organise quarterly timber protection workshops targeting architects and builders.
- **Develop Technical Guides:** Create detailed technical documentation on timber treatment and application best practices.
- **Schedule Site Visits:** Plan regular site visits to offer on-site technical advice and product demonstrations.
- **Industry Collaboration:** Partner with architectural associations for joint seminars promoting timber sustainability.
- **Create Project-Specific Solutions:** Offer consultations for large-scale projects to specify the correct timber protection products.
- **Recognition Program:** Develop a "Wood Champion" award to recognize architects and builders promoting wood as a sustainable material.

Key Outcome: Position the company as the go-to technical expert in timber protection for large-scale and bespoke projects.

2. Distributors / Retail (Sales support & relationship-building focus)

Tasks:

- Retail Staff Training: Run monthly training sessions on product features and benefits for retail staff.
- Co-Branded Marketing: Develop point-of-sale materials, co-branded brochures, and promotional campaigns.
- Joint Customer Events: Collaborate with distributors on timber care events targeting DIY and trade customers.
- Inventory Support: Assign account managers to provide forecasts and reorder recommendations.
- Sales Incentives: Launch a rewards program for distributors who exceed sales targets.
- Regular Check-Ins: Schedule quarterly meetings to review performance, address concerns, and share product updates.

Key Outcome: Equip distributors with the knowledge and resources to confidently sell timber protection products while strengthening partnerships.

3. End Users (DIY & Homeowners) (Education & environmental engagement focus)

Tasks:

- Create DIY-Friendly Guides: Develop simple, step-by-step guides on timber care and protection.
- Social Media Engagement: Post regular timber care tips, project showcases, and product demonstrations.
- Host Community Events: Run "Timber Care 101" sessions at local hardware stores and community centres.
- Introduce a Help Hot-line: Establish a dedicated DIY support line for product application questions.
- Sustainability Campaign: Launch a "Love Your Timber" campaign, highlighting timber's environmental benefits.

Key Outcome: Build trust with DIY customers by offering educational resources and responsive, practical support.

Appendix

Qualify with BANT

B – Budget

What is their budget and does this fit with our product offering?

A Customer's ability to afford our products is a huge determining factor of whether they will invest in our products or not.

Discussing the budget early, not only helps to qualify, but enables you to make suitable design suggestions, based on the Customer's budget.

Examples of how to approach qualifying on Budget

"Many of the customers we speak to at CUTEK® Group about projects like this often have a general idea of the cost they're comfortable with. Do you have a figure in mind?"

- If the response is "I have no idea", your response is "no problem". "In the interests of transparency, let me give you a broad-based price range" if you know this project is around $15,000, "I would say if you have no idea, that's okay, let me give you an insight into what it might be. Some people who would make an investment into a project like this would be paying around the $15,000 mark, it will not be $20,000 and it will not be $10,000. Somewhere around the $15,000. Can I get some initial feedback on where that figure is sitting with you?"

"What other solutions are you evaluating?"

A – Authority

Does the person I am speaking with have the authority to make the decision?

We live in a world where our customers are busy.

As a result, we often don't get to talk to the economic decision maker until later in the process, if ever.

Examples of how to approach qualifying on Authority

"How do you evaluate differing proposals?"

"Who else, obviously in addition to yourself would be involved in the final decision?"

"How do you make your final decision ... other than pricing, what else really matters?"

"What matters to the additional decision makers?"

"What concerns do you anticipate they could potentially raise with our proposal?"

N – Need

What is their need and which of our products will best suit?

It's your responsibility to identify what need exists and what will be the best solution for the Customer.

If we can't convey the value of our solution to meet the Customer's needs, they won't make their investment with us.

Examples of how to approach qualifying on Need

"[Question]"

"[Question]"

"[CUSTOMER NAME], thanks for answering those questions. It certainly gives me a deeper insight into what you are looking to achieve. In the interest of clarification, I am wondering on a scale of 1 to 10, 10 being critical and 1 being 'get to it when I get to it', whereabouts is this purchase sitting with you at the moment?"

N – Need [STAR Included]

Are they aware of and understand that they have a problem?

When it comes down to it, you're not selling — you're solving problems.

A prospect that understands a problem exists and is actively seeking a solution is a prospect that truly has a need. There are different spectrum's of a prospect's need. One person might have a current solution in place but is unaware of a more effective solution. Another prospect could agree there is a problem but was entirely unaware a solution existed and was not actively looking or has 'dealt with it thus far.'

It's up to you to quickly identify that the need exists, the prospect is aware of their need, and there is an appetite for a solution.

CUTEK® uses the STAR approach for better understanding the needs of our prospect:

Examples of questions for qualifying on Need with STAR

Situational

What does your current supplier do well?

Tell me about your current [SERVICES/PRODUCTS]?

How long have you been with the current supplier and will you leave them for a better position?

What current challenges have you got with your current supplier?

Can you describe a situation where your current solution fell short?

Tell me about a recent project or initiative that prompted you to look for new solutions.

Tension (Pain Points)

Do you have delays in [SERVICES/PRODUCTS] and what affect does this have on your business?

What specific frustrations are you experiencing with your current solution?

What are the biggest obstacles preventing you from reaching your objectives?

Affect

How have these problems affected your daily operations or overall productivity?

In what ways have these challenges affected your team's performance and morale?

Resolve

What steps have you taken to try to resolve these issues?

What would a successful resolution look like for you?

How do you anticipate your operations will improve once these issues are resolved?

Overall Need Assessment

A simple way to gauge your prospect's need for your solution is to 'get medical'.

Ask them how much their pain points bother them on a scale of 1 – 10.

> "[CUSTOMER NAME], thanks for answering those questions. It certainly gives me a deeper insight into what you are looking to achieve. In the interest of clarification, I am wondering on a scale of 1 to 10, 10 being critical and 1 being 'get to it when I get to it', whereabouts is this purchase sitting with you at the moment?"

Prospects who rate their pain between 7 to 10 are your most qualified.

T – Timeframe

When are they considering this purchase? Now or in the future?

Timeframes are a function of prioritisation.

Define timeframes or you are selling **blind.**

Examples of how to approach qualifying on Timeframe

"[Question]"

"[Question]"

"Let's talk about timeframes … when will a decision be made on this?"

"What's driving that timeline?"

"How important is this to you and where does this stack up in terms of priority and urgency? What are some of the other priorities in play at the moment?"

"So just to be clear, you will make a decision on this by (date) … is that about where we are today?"

"I have delivered a lot of proposals and sometimes, for various reasons, things change. Can I ask you under what circumstances would your timeframe change on this purchasing decision?"

Case Studies

As you are having Customer conversations, think about any case studies from other Customers that may be relevant.

For example: are there consistent issues across the Customer groups or for certain industries, are Customers seeing benefits of complementary [SERVICES/PRODUCTS], is there a noticeable spike in a certain need?