

# STORIS NEXTGEN SALES PLAYBOOK

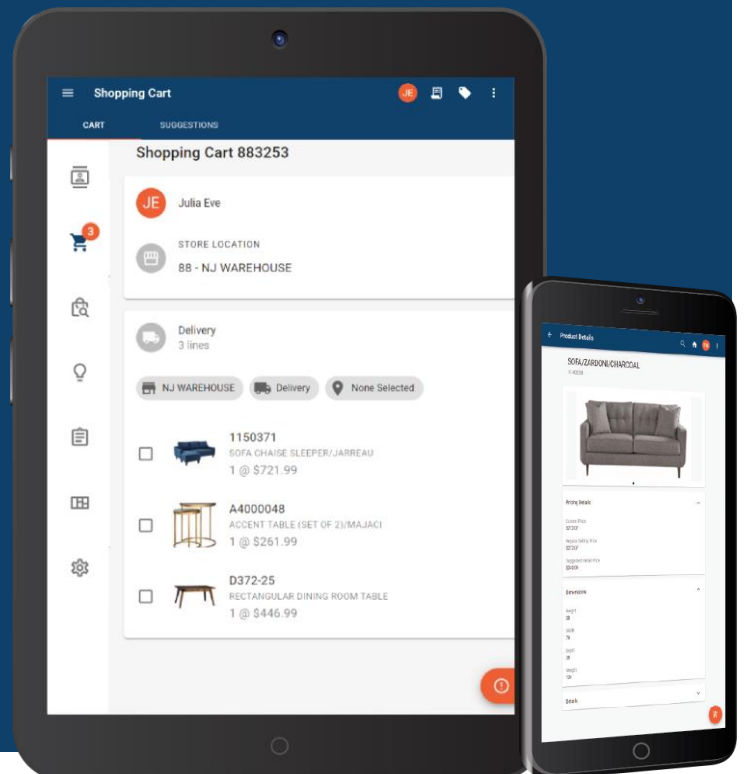


**STORIS**

# Welcome to the **STORIS** NextGen Sales Playbook

This document outlines the various steps in the sales cycle and the ways in which technology can be leveraged to enhance the selling process. To begin, there are several core disciplines we will address as you start to work with a guest.

## WELCOME





# INTRODUCTION

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# Core Concepts

## EVERY GUEST MATTERS

- Leave any personal issues at the door.
- Dress and act professionally.
- Do not cluster on the showroom floor.
- Have all the tools necessary to provide the guest with an exceptional experience.
- Make sure your device is charged and you are logged into STORIS NextGen before greeting a guest.
- Utilize your co-workers, technology, or any other tools to enhance the experience.
- Focus on providing a great guest experience and the sales will follow.

# GEARING UP FOR A GREAT GUEST EXPERIENCE

The selling process begins before you speak with your first guest. Come to work prepared and ready to effectively and professionally serve your guests.

Before you greet guests for the day, ensure you do the following:

- **Leave Personal Issues at the Door**

As soon as you arrive at work, leave any *personal issues at the door* and get ready for the day.

- **Dress Professionally**

Come *dressed professionally*.

You are, after all, a sales professional and should carry yourself that way.

- **Prepare to Serve**

Be *prepared to serve*.





Benjamin Franklin once said,

*“By failing to prepare, you  
are preparing to fail.”*

**This still rings  
true today.**



# GEARING UP FOR A GREAT GUEST EXPERIENCE

Before going up to greet a guest, are you ready to efficiently serve them?

You should have completed all preparation tasks and have all the tools ready to go that are necessary to deliver a great guest experience!

- Your iPad, tablet, or device is **turned on** and you are logged into STORIS NextGen.
- You have a paper and pen to sketch out the room or know where the supplies are located.
- You have business cards ready to be handed to the guest.





*Everyone has habits and successful sales professionals make preparing for the day part of their daily ritual.*

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How do you prepare for each day?

Do you have a daily routine or checklist you complete before you hit the showroom floor?

Here are some activities you should do to prepare for the day:

- Review and prepare for appointments for the day
- Make sure you are knowledgeable on all current promotions and specials
- Learn about any new products or showroom displays



Every person that walks through your door is a valued guest and should be treated as such.

*A single exceptional experience can lead not only to a sale, but to a lifetime advocate for yourself and the brand.*

You never know which customer could result in rave reviews and referrals.

The goal for each guest should not only be to close a sale, but rather to provide them with an exceptional shopping experience they will not soon forget and share via word-of-mouth or Social Media!

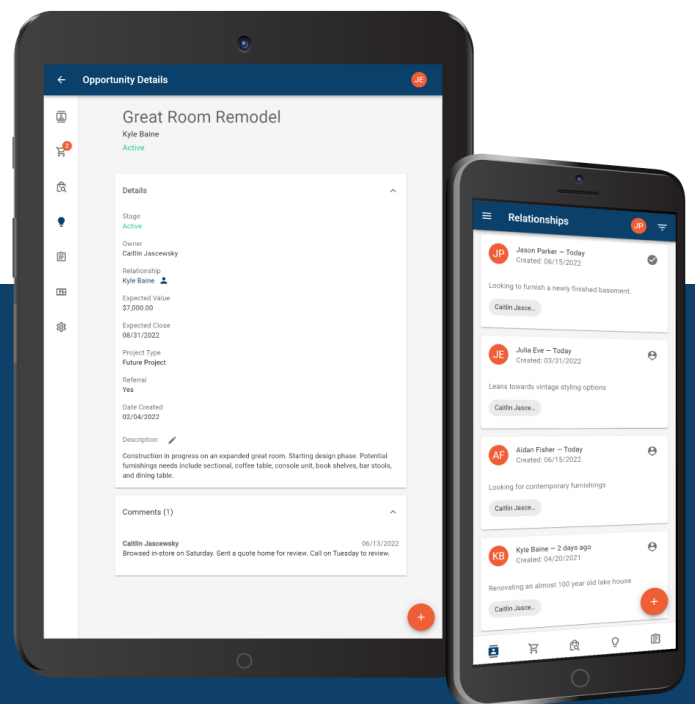
**Make sure every guest is greeted when they come into the store. Do not cluster on the showroom floor.**

Guests are going to be less willing to walk up to a group of salespeople and interrupt their conversation when they need help. As a result of avoiding clustering, you seem more approachable to the guest.

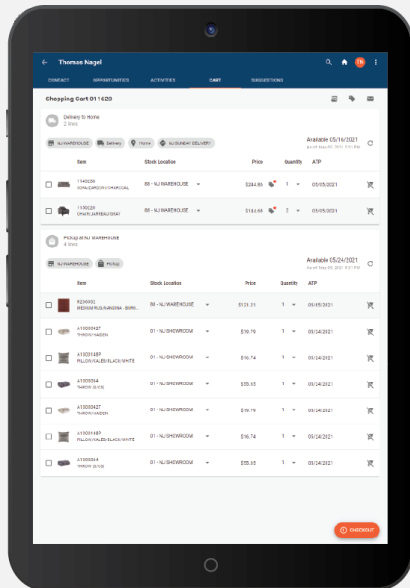
**Utilize all resources at your disposal to provide each guest with a great shopping experience.**

If you are not adept at using the tools available to you, spend time to learn proficiency so you can better serve your guests. Your managers and co-workers can be greatly helpful in assisting with guests.

**EVERY  
EXPERIENCE  
MATTERS**



**Utilizing teamwork leads to success for all!**



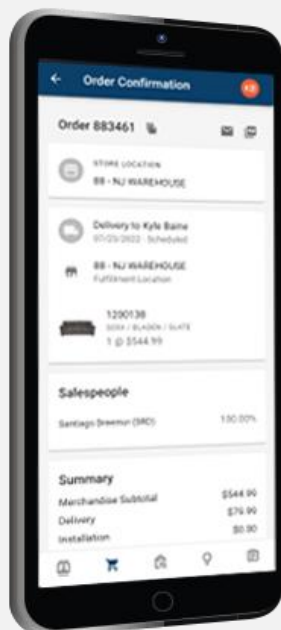
# What technology or other tools can you use to help a guest?

Make sure you have those ready before you greet your first guest for the day. Your device should be charged, and you should have all relevant handouts or other tools at the ready. You don't want to be fumbling with different tools when you start working with a guest. Remember, always come ready to serve.

**We have broken the selling process down into five different steps:**

- Greet
- Discover
- Demonstrate
- Close
- Follow Up

At its core, the selling process should be focused on using selling skills and processes to craft a great guest experience that will ultimately result in sales!





# CHAPTER 1: GREET

**GOAL:** To begin to build trust with a guest and establish a personal connection. A **Great Greet** makes the guest feel welcome and comfortable as well as sets the stage for a positive shopping experience.

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# Core Concepts

## BE FRIENDLY AND INVITING

- The Greet is where you begin to form a personal relationship and connection with the guest.
- Make sure your Greet is not related to business.
- Encourage conversation by using open-ended questions.
- Introduce the technology and tools you will be using to help serve them.
- Create a Relationship in STORIS NextGen CXM to keep track of important details about that guest.
- If working with multiple guests, ask your guests permission to attend to another guest.





You are prepared and ready to Greet a new guest, now what? What do you say and how do you say it? Here are a couple of tips for making the most of your Greet:

Always approach the guest like you would a friend. A **friendly disposition** means you are walking up with a smile on your face and with pep in your step. You are excited to see the guest and are enthusiastic to provide your services to ensure they have an unforgettable shopping experience.

Remember, you are not just Greeting a guest, **you are Greeting a person who could become a loyal customer for life.**

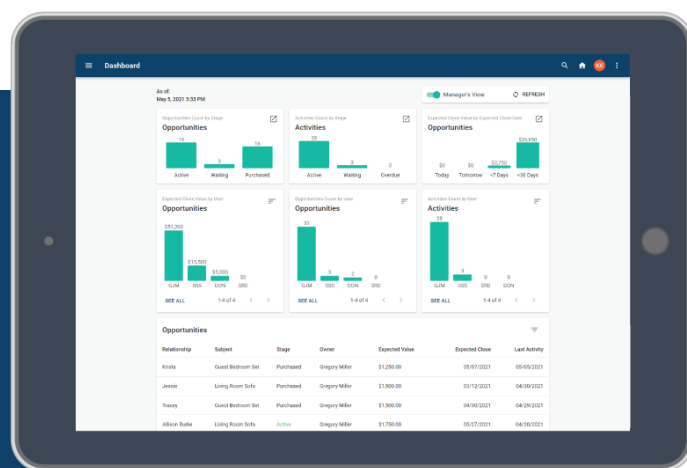
In order to start developing a personal relationship with a guest, the right attitude goes a long way.

Make sure your initial Greet is a **non-business Greeting**. The first conversation with a guest in the store should be personal, not related to what brought them in today. The goal of Greeting a guest is beginning to make a personal connection and to establish a relationship.

While you should always aim at closing the current sales opportunity that day, that's only short-term success. The reality is no one can close every guest they work with during the first engagement.

Building a personal relationship with your guests and exceeding their expectations can result in not just the first sale, but **long-term success.**

# ANATOMY OF A GREAT GREET



**The ultimate goal is a customer for life and referrals.**

# MAKING A MEMORABLE INTRODUCTION

You are not just a Salesperson looking to sell merchandise, you are a person armed with knowledge and technology who can help a customers' vision become a reality.

You are providing your services to ensure they not only find the best options for their space, but have an enjoyable time along the way.

## **A talking guest is an engaged guest.**

Make sure to never interrupt the Guest when they are speaking. Opening lines can span a variety of topics: current events; the clothing brand or sports team they are wearing; kids who might be shopping with them; etc.

Also, steer clear of any controversial topics. It's important to ensure your Greeting is sincere, and its your own.

**Get the names of everyone in the party.** Make sure you find out the names of everyone in the group.

**Always use open-ended questions when speaking to a guest.** Utilize questions that encourage your guest to speak freely and spur further conversation.

## **Open-ended question examples:**

- "I couldn't help but overhear you and your friend talking about the new movie. I am really excited to see it. How is it?"
- "How did you celebrate last weeks holiday?"
- "I'm planning my vacation today. Where have you been that's exciting?"
- "Glad it's a three-day weekend! How is the traffic out there?"

Avoid closed-ended questions that end with a one-word response and lead to a **"No"**, such as "Can I help you?" or "Will this work for you?"

# INTRODUCING THE TECHNOLOGY

**Ask if they have shopped here before.** If not, let the guest know why they made a smart decision walking into your store. If they are a returning guest, welcome them back and ask for a phone number or email address so you can pull up their account.

Before transitioning to **Discover** what brought the guest into the store, **introduce the technology.**

Before you start to utilize STORIS NextGen solutions, within the shopping and buying process, **provide some context as to what you're doing and its value to the guest.**

The goal of using technology is to enhance the guest's shopping experience. Wait for the right moment or a natural pause in the conversation before using the technology.





Here are some examples of lines you can use to introduce the technology you will be using throughout the sale:

- “I just want to mention, I have this application I will be using to take some notes as we go along. I can use it to look up more detailed information about products you are interested in, tag any items of interest, and even show you options we may not have on display in this store. Would that be okay?”
- “In order to help find the absolute best product for your space, would you mind if I take notes as we discuss how you want to change this room?”
- “If you see me typing anything on my device, I’m taking notes and tagging any items you might be interested in. One of the cool things I can do on this device is mark any pieces that may be a good option for your space and then we can narrow down those options later.”



# STORIS NEXTGEN CXM: BUILDING A RELATIONSHIP

The Greet is all about starting a personal Relationship and beginning to establish a connection with your guest. You want to first **create a Relationship within STORIS NextGen CXM**. Creating a unique Relationship for that guest will allow you to easily track important details about the guest and their intended purchase.

Even if you don't have a lot of information at first, having a unique profile will help you stay organized as you go through the selling process.

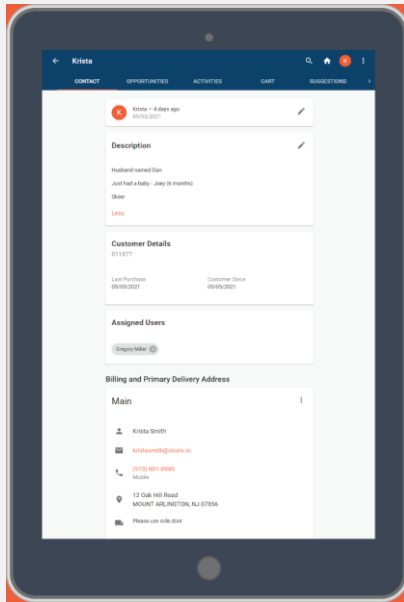
By creating the Relationship in CXM you can:

- Jot down any vital personal information or common ground you have with the guest.
- Keep track of important details about their intended purchase.
- Tag items of interest in the Digital Shopping Cart.
- Manage next steps for the sale all linked within their Relationship profile.

As with all new processes, naturally working CXM into your selling process will take time. Learning how to utilize technology efficiently while keeping your focus on the guest will continue to improve with each use.

Mastery of anything new takes time, persistence, and most of all, practice. Roleplay with fellow coworkers, ask your managers for help, and practice with every guest. Start now and you will be an expert in no time.





# WORKING WITH CONCURRENT GUESTS

You may often work with multiple guests concurrently. When you find yourself in this situation, ask permission from that guest before going to attend to the other guest.

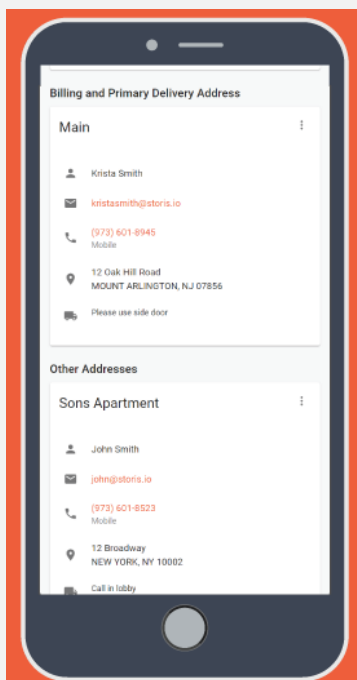
**Ask for the guest's permission to leave** and let them know you won't be more than a couple minutes. Upon returning to a guest, thank them for their patience.

As you are walking between different guests, **change the active Relationship in CXM.**

If working with two guests who have Relationships created in CXM, navigate to the Relationship page to quickly toggle between them.

If it is a new Guest, then use all the information above to have a great greet. Getting in the habit of changing the active Relationship when you navigate between guests will ensure you keep all the information with the appropriate guest.

Now that you have greeted the guest and started to build a personal relationship, let's continue and transition to **Discover** what brought them in today.





## CHAPTER 2: DISCOVER

**GOAL:** To identify not only what the guest wants, but the motivations driving their decision making. Understanding the “**why**” behind the purchase helps build trust, to identify which benefits to highlight for the guest during the product demonstration and overcome objections to close the sale.

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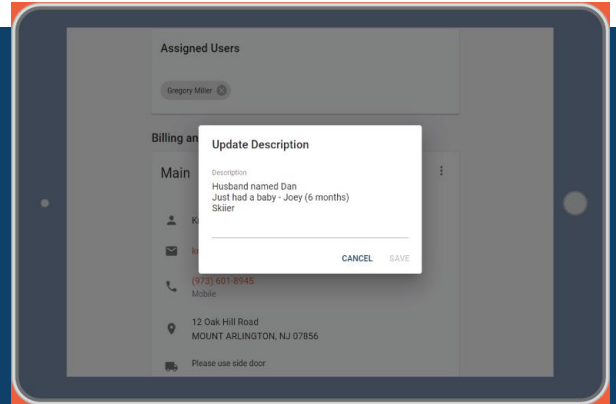
# Core Concepts

## IDENTIFY WHAT THE GUEST WANTS AND WHY THEY WANT IT

- Transition to Discovery after establishing a connection.
- Keep guests engaged in Discovery by asking open-ended questions.
- Understand the personal needs of a guest to increase the likelihood of closing the sale either that day or in the future.
- Create an Opportunity to keep track of key details about this purchase for easy reference.
- Sketch the room to better understand the guest's vision.
- Take the time to understand the guest's needs to aid in an effective product Demonstration.



# TRANSITIONING TO DISCOVER



You have greeted the guest and started to build a relationship with them. Now, it is time to **Discover what it is they are looking for**. The trick is to utilize questions to identify what the guest is looking for and why the customer wants the item. The right Discovery questions help an associate understand the wants, needs, and vision of a guest.

Discovery will also serve to strengthen the trust between you and the guest. The first Discovery question you ask a guest will be aimed at identifying exactly what they are looking for. It can be as simple as **“What brings you in today?”** This is an effective question to start the Discovery process.



# NOT JUST WHAT, BUT WHY

Understanding **WHY** helps you understand the guest's vision more fully. It is important when asking Discovery questions to **keep the questions open-ended**.

Remember, a communicative guest is an engaged guest. Keep questions open-ended to ensure you get all the details from the guest to better understand what is driving their decision making.

Use these at the beginning of your questions to keep them open-ended.

- **WHO**
- **WHAT**
- **WHERE**
- **WHY**
- **WHEN**
- **HOW**



**Turn:**

**“Did you want a darker or lighter color?”**



**Into:**

**“What color scheme or mood are you establishing for the room?”**

# FINDING THE VALUE

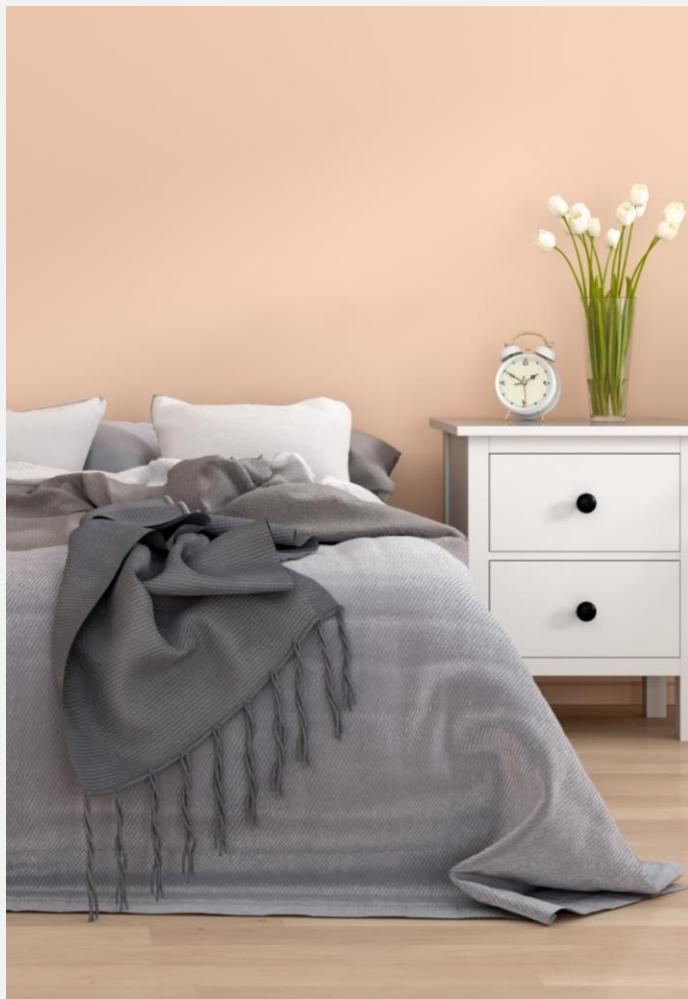
Do not forget to be an active listener to the guest's response. Discovering the motivations behind a guest's purchase will help you to target the product Demonstration.

**By knowing what the needs of the guest are, you can create a tailored demonstration that highlights specific features that provide value to the guest.**

If all you know about the guest is that they need a mattress, you will never be able to sell value.

Here are examples of Discovery questions you may ask a guest:

- Who typically uses the room?
- What features are important?
- How long have you been looking?
- Tell me how the space is used?



**EXAMPLE:** If a guest mentions that they have a bad lower back, you can highlight how the mattresses you are showing them provides the greatest lumber support of the models you carry.

# MAKING THE MOST OF EACH OPPORTUNITY

It is important to actively listen to a guest while they are speaking. They are divulging important information that can be critical in finding the best piece for their space. By paying close attention to what they say, you can serve your customers effectively.

**What should you do with this critical information?** Take notes in STORIS NextGen CXM. These details could be pivotal in closing the sale either today or at a later point in time.

To do this, the first thing you should do is **create an opportunity in CXM**. Jotting down key information in CXM will ensure you don't have to remember everything. You just need to review your notes before reaching back out to a guest.

However, you don't need to write out every response from a guest verbatim. **Take notes on what is important and unique to this sale that separates it from others.**





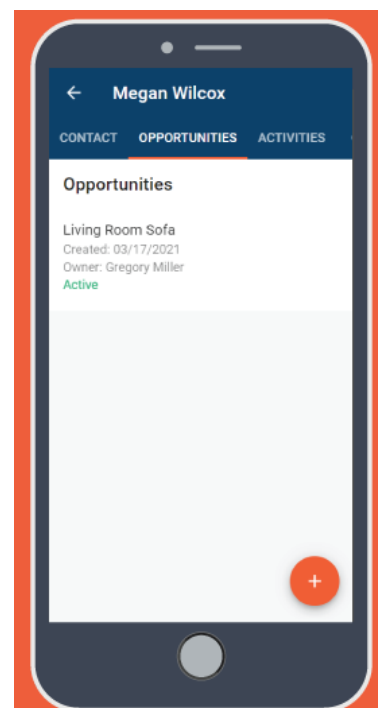
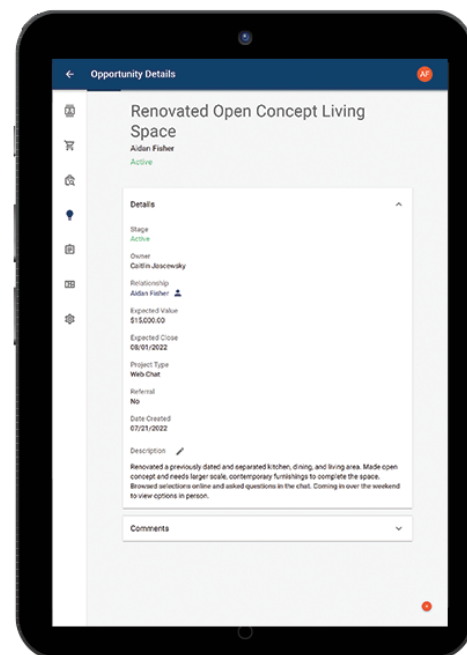
# THE DETAILS MATTER

Keep track of what the guest wants in the Opportunity's subject and add any important contextual notes in the Opportunity description or comments. The responses to these Discovery questions can be critical when reaching back out to the guest.

Information such as:

- **Wants a fold out sofa for her son's sleepovers**
- **Has a bad lower back and cannot get a good night's sleep**
- **Hosting family gathering in December and needs larger dining room set**
- **Redoing the living room to host large family movie nights**

All this information is important to log. While in the moment, you may think you will remember it all, but what about in a week or a month? It's impossible to remember what was important to every guest when you follow back up with them later. By logging and referencing this information before reaching back out to a guest, you can seamlessly pick up the conversation where you left off.



# SKETCH IT OUT

After asking some preliminary questions to better understand what the guest wants and why, it can be helpful to sit down with a guest and sketch out their room.

**This is a visual way to better understand the guest's vision for their space.**

Home furnishings are a major purchase. Taking the time to understand what the guest currently owns and how they want to change the space gives you valuable information and shows the customer you care.

While this may not be the best approach for every guest, it can be a useful selling tool in the right circumstances. Take a seat, grab some graphing paper, or open a program on your device. Sketch their space to better understand the guests' vision while continuing to build a personal relationship and trust with the guest.

You now have identified what the guest needs and understand what's important to their decision-making process. It's now time to conduct the product **Demonstration**.





## CHAPTER 3: DEMONSTRATE

**Goal:** To use the information gathered during Discovery to create a personalized product Demonstration that highlights **how a product and its features benefit the guest**. Doing this builds value for the guest. Products should be added to a Shopping Cart to keep track of any items of interest that best fit the guests needs.

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# Core Concepts

## KEEP GUESTS INVOLVED IN THE PRESENTATION

- The Demonstration is where you can establish value and create a desire to buy.
- Use information from the Discovery to highlight features that provide value to the guest.
- Focus on the benefits of the product to add value beyond the features.
- Use the STORIS NextGen platform to answer detailed product questions, add related items, and build out the room.
- Add any items of interest to the cart. Final selections can be narrowed down later.



# ADDING VALUE IN THE DEMONSTRATION

Time to show the guest some products! Armed with information, you can now escort a guest around the showroom to showcase products that will best fit their needs. Utilize the answers from the Discovery questions to ensure you Demonstrate the features and benefits of each product that generate the most value to the guest. Having a detailed Discovery with the guest will give you information you can use to have a strong Demonstration.

**Remember, features do not sell products, benefits do.**

Benefits are unique to each guest based upon their motivations behind buying. You can effectively highlight the features that will provide the most value to the guest if you understand what is influencing their purchasing decision.

Always **keep guests involved in the Demonstration**. Have them sit down on the sofa, recline, and feel the material. Encourage the guest to try it out themselves. Let them experience the features firsthand as you explain how that feature will benefit them. This is how you begin to build value.





One of the techniques frequently employed to highlight benefits to a guest is the F.A.B. technique:

- Feature
- Advantage
- Benefit

# HOW DOES THIS BENEFIT THE GUEST?

The F.A.B. Technique advocates for:

**Feature:** Highlighting a feature or quality about an item.

**Advantage:** What advantages does the feature provide for the customer.

**Benefit:** Explaining what the guest will gain by having the feature.

**For example:**

- This dresser comes with a lockable, felt-lined jewelry tray. This is a secure place to comfortably store jewelry without damaging it, which means it would provide a safe space to keep jewelry from your grandmother.
- Wouldn't it be convenient to have a built-in section right in your dresser for your jewelry?



While working with a guest, they will inevitably ask a question you do not know off the top of your head. That's okay, STORIS NextGen is here to help! Once a guest expresses interest in a product, easily search for it in the application.

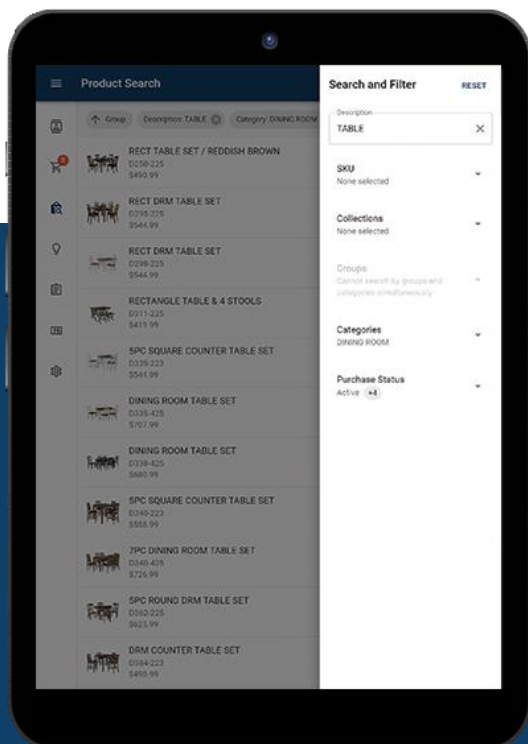
**STORIS NextGen allows you to quickly find detailed information about a product's price, availability, dimensions, and more.**

You can use the STORIS NextGen platform to pull up related items a variety of different ways to help show a guest pieces with the same style or alternate options that are more in line with the customer's preferred aesthetic.

If **Related Items** is set up within the STORIS NextGen platform, use them as an advantage. They can be a valuable tool in building an entire room.

Related Items give recommendations for complementary pieces that will complete the look. The best part is, you have real-time access to all this information without ever having to leave the guest.

One of the strategic aspects of STORIS NextGen is that your entire catalogue is at your fingertips, even if it is not on display at your location. Utilize product images to show a customer a piece that may not be on display at your store but would be a great fit for their new space. Images can be scaled to full screen on your device and reviewed with the guest.



# LET ME CHECK FOR YOU



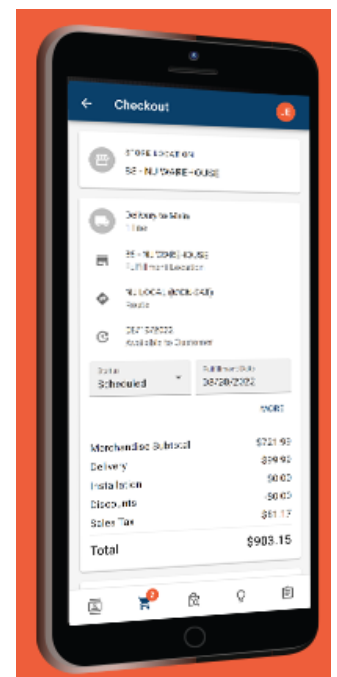
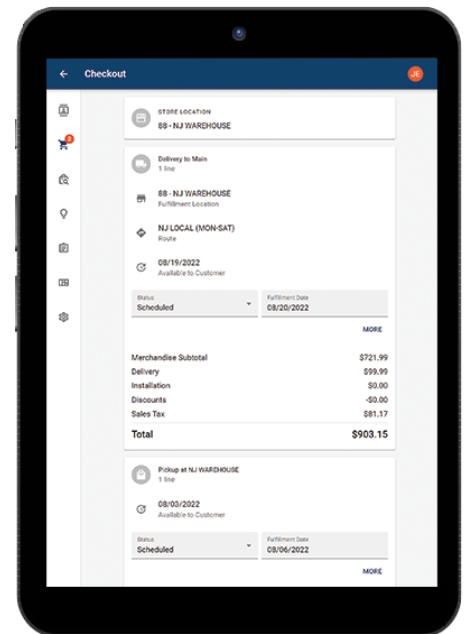
# CREATE THE CART

As you present different products to the guest across the showroom, **keep track of all these items by adding them to the STORIS NextGen Digital Shopping Cart**. Add everything!

The shopping cart is a way associates can keep track of every item a guest is considering which can then be reviewed to narrow down their selections at the end of the shopping experience. Creating the shopping cart while working with the guest will allow you to quickly checkout using STORIS NextGen Mobile POS when they do decide to buy.

If the guest does not buy today, it's not a problem. Those items are saved in the shopping cart which will remain linked to their profile in STORIS NextGen CXM. For the customer that isn't ready to purchase, ensure they are sent home with their narrowed-down shopping cart so that it can be quickly converted to a sale as soon as they are ready.

Once you are done walking the showroom with the guest and have built out the cart, it is time to **Close**.





## CHAPTER 4: CLOSE

**Goal:** To transition a shopping experience to a purchase. During the Close, associates should be on the lookout for buying signals, handle any customer objections, and aim to increase the order value with add-ons.

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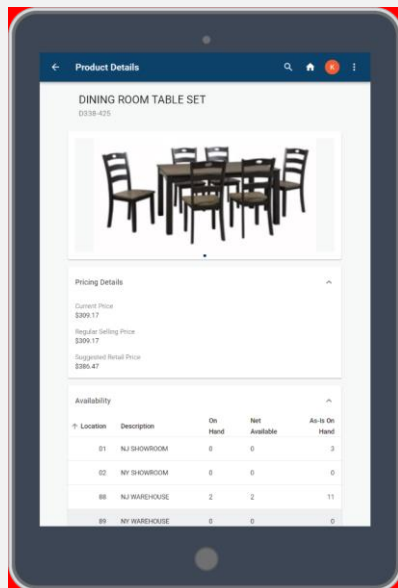
# Core Concepts

- Be on the lookout for buying signals which can provide guidance on when to attempt to Close.
- Narrow down multiple products to the final selections.
- Use add-on tools to help increase your average ticket or transition to the Close.
- Identify any objections a guest may have.
- Update the cart and relationship with any additional information from the guest.
- Checkout and create the sales order or sales quote after reviewing order details with the guest.
- If your organization has a Team Opportunity process, use it.

*How you attempt to Close may differ, but it is your job to attempt to Close every opportunity.*

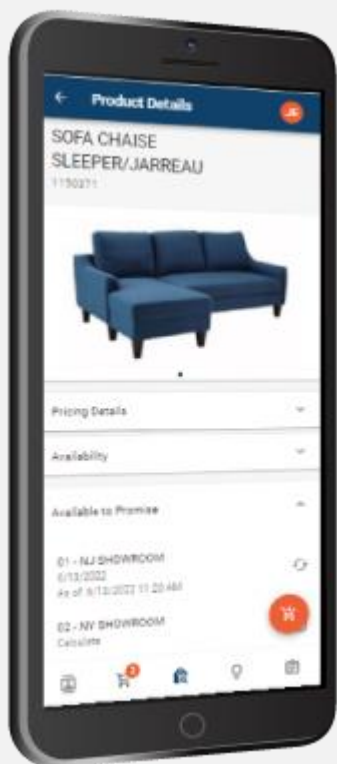


# NARROWING SELECTIONS



You have spent time getting to know this guest, uncovered what the guest wants and why, and performed a personalized Demonstration. Now, it is time to narrow down the selections and Close the sale.

If the guest expressed interest in several different options for the main item, **review the options and highlight some of the differentiating features of each. Reiterate the value each piece provides to the guest.**



You can see all the tagged items in the STORIS NextGen Digital shopping cart and quickly answer any questions about availability, price, dimensions, and more. If a guest wants to see the items again, you can either traverse the showroom or pull up the Product Details screen and review the items right within STORIS NextGen. Reviewing the cart and narrowing down the selections is the first step to Closing.



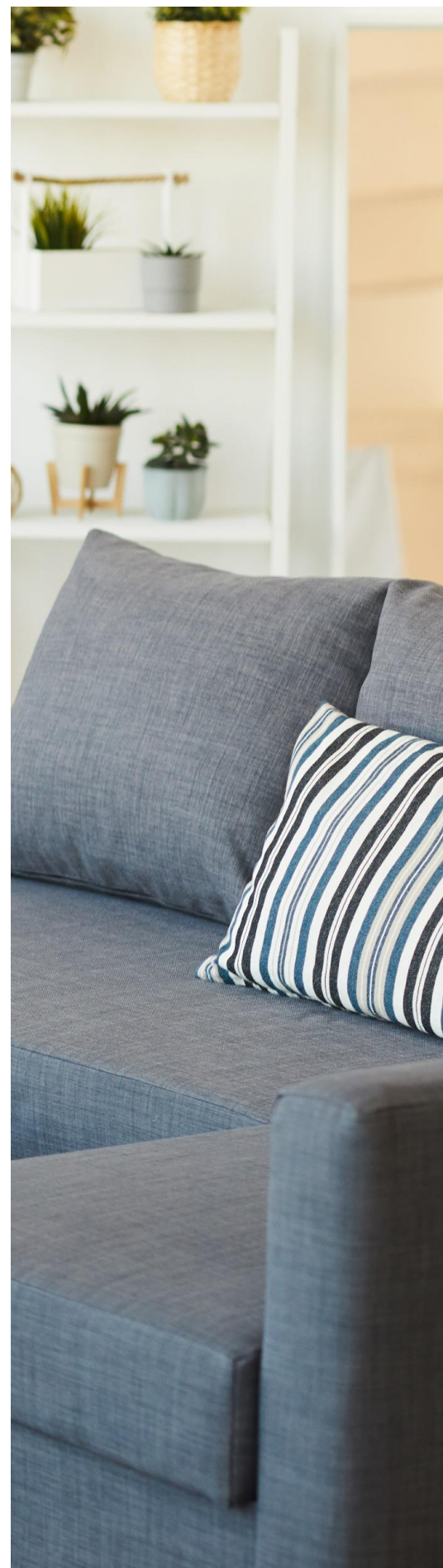
# ADD-ON TO UP-SELL

Adding on items, once the main items have been narrowed down, can serve to not only increase your ticket size but also to transition to the Close. **A guest will not buy something you will not sell.** Start to add-on once you feel confident that the guest will buy the main item.

If the guest is not comfortable with the main item, look to uncover the reservations or objections they may have. Recommend matching items to complete the room using your own product knowledge or by utilizing the tools within STORIS NextGen such as Suggestions, Related Items, and the Quick Access Links in Product Details.

**Update the Shopping Cart** as you learn more from the guest. Create multiple fulfillments to track the guests preferred fulfillment method for each item and to have STORIS NextGen Mobile POS calculate accurate order totals. Remove products they are no longer interested in and use the various tools at your disposal to increase the ticket size with add-ons. Finally, add any eligible discounts codes to line items to show the customer what they could save.

As you get more information about the guest, update their contact details. **All of this data will flow back into STORIS when you checkout and create the Sales Order.**



# CLOSING: A NATURAL NEXT STEP

You formed a personal connection with the guest in the Greet, developed trust during Discovery, and established value during the Demonstration. The natural next step is to Close. You are a sales professional; **it is your job to Close.**

Be on the lookout for buying signals, some will be obvious while others may not. The right buying signal can indicate when to start to Close.

Some examples of buying signals are:

- Does it come in a different color?
- Can I get it delivered next week?
- What is your return policy?
- Is it covered under warranty?
- Do you take Amex?
- How much do I need to put down?

Of course, the most obvious buying signal and one everyone loves to hear is: **"I'll take it!"**



# CLOSING TECHNIQUES

There are many ways to try to Close. Here are some techniques that can be applied in most circumstances:

- **Add-on** - Attempt to add products onto the sale to complete the purchase. Assumes the guest will take the main item: *“Would you like to protect your new sofa with an extended warranty?”*
- **Assumptive** - Assume the guest is going to take it. *“Let’s go ahead and get this into the system for you.”* Do not use if the guest has expressed any resistance.
- **Ask For It** - Simply ask for it! *“Would you like me to write this up for you?”*
- **Reflexive** - Turn a guest’s question back on them to get a commitment: *If a guest asks: “Can I have this delivered next Friday?” respond with: “Would you like it delivered on Friday?”*

- **Either/Or** - Present two different options for the guest to say “yes” to: *“Would you like the modern or traditional dining set?”*

OR

- *“Would you like to pay with a credit card or finance the order?”*

Once you have successfully Closed the guest and gotten the commitment for the purchase, it is time to get it in the system. Proceed to checkout the guest in STORIS NextGen Mobile POS to schedule the order and expedite the creation of the sale. Orders created in STORIS NextGen are instantly synced over to STORIS and can be immediately pulled up and reviewed if needed. **Be sure to review all items on the sale and anticipated Pickup/Delivery times with the guest before they leave the store.**

Remember, any updates you do in STORIS will subsequently flow back into the STORIS NextGen platform.

# IDENTIFYING OBJECTIONS

An objection does not mean you have lost the sale. It means you have something convincing to do.

**A guest will purchase if there has been sufficient trust and value established.** If the guest has an objection, it simply means one of these was insufficient for the guest to pull the trigger and commit to the purchase.

It is critical to identify what the objection is, whether it is the true objection, and to try to overcome it.

**Some common Objections include:**

- **INDIRECT:** I need to speak with my significant other.
- **INDIRECT:** I need to go home to take measurements.
- **INDIRECT:** I am still shopping and am not ready to purchase yet.
- **DIRECT:** I don't like \_\_\_\_\_ about the product.
- **DIRECT:** It's too expensive/More than I wanted to spend/Want a better price or discount.





# OVERCOMING OBJECTIONS

**Direct objections** are when a guest specifically calls out a certain aspect of the product they do not like. When dealing with a direct objection, you should circle back to Discovery and Demonstration to find a product that better fits their needs.

**Indirect objections** are when a guest has not expressed a specific issue they have with the product. In this case, you should work to confirm whether it is a true objection or if the guest is just unsure about the purchase.

When dealing with price objections, it is key to identify whether the issue is due to budgetary concerns or if the guest does not think the item provides enough value to justify the price.

- If it is budget, you can discuss financing options or find another item that better fits their price range. Keep the original item in the Shopping Cart in case it is still their preferred choice.
- If it is value, revisit some more features and benefits of the item that provide value to the guest.



# OVERCOMING OBJECTIONS

You will not overcome every objection; that's okay! Remember, you are working **WITH** the guest. Be empathetic with their concerns and understand where they are coming from. **It is important to identify whether this is a true objection or just the customer avoiding telling you why they are hesitant.** Make sure you listen to their full objection before continuing. Let them know you can appreciate where the customer's concern is coming from. Remember, you are on their side.

Get permission to ask another question before continuing and then ask questions to identify what they do not like about an item until you uncover the true objection.

If your organization has a Team Opportunity process in place, use it. If the guest has a specific question you are unsure of, there is a personality conflict between you and the guest, or you are just having a problem getting this opportunity over the finish line, then pull in a team member who can help.

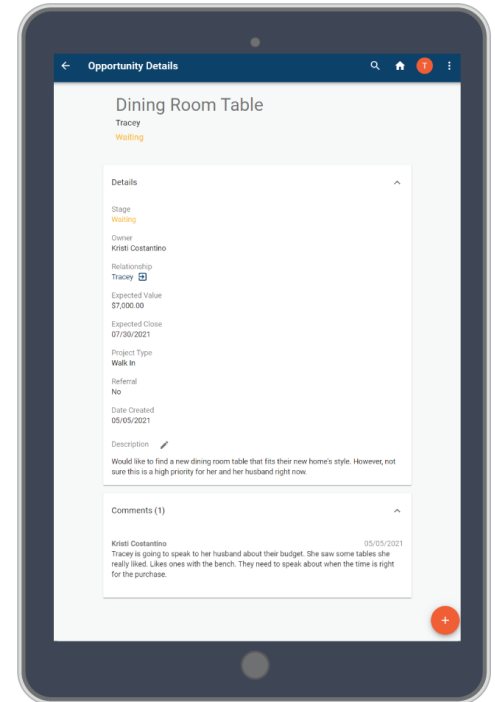


# NOT BUYING TODAY? THAT'S OKAY!

While we would love for every single customer to purchase the same day, that will never be the case. There will always be legitimate reasons for the guest to not purchase right away and that's perfectly fine. Remember, at the end of the day your goal is to provide the guest with both a product that provides true value and an enjoyable shopping experience. Trying to force a guest to Close that day does not lead to a positive shopping experience, just the opposite. Be understanding of their situation and reinforce that you are there to help them.

Never forget your goal throughout the selling process is to help a customer. A short-term result of a great sales professional is closing a sale; however, **the true goal of every sales professional should be to create a lasting relationship with a guest.** That is where the real value lies.

If the guest does not want to Close that day, note the guest's objections in the Opportunity. This will allow you to quickly recall the guest's specific objections when reaching back out at a later point in time. This will be reviewed in our next stage, **Follow Up.**





## CHAPTER 5: FOLLOW-UP

**Goal:** To follow up with a guest and complete the full sales process. This is when associates can make a great shopping experience exceptional with a personalized Follow-up driven by the desire to best serve your guest.





# Core Concepts

- Follow-ups should be an extension of the relationship created with the guest.
- Follow-ups must be personalized for that guest. Avoid generic emails and texts.
- Follow-up is a giving step. It should provide value to the guest.
- Review your notes in STORIS NextGen CXM before crafting your Follow-up message or reaching back out to a guest.
- Regardless of whether a guest buys or does not buy, there is always a next step in the process.
- Use post-sale Follow-ups to cap off an exceptional guest experience and potentially generate new sales opportunities.
- Update your data in CXM to reflect outcomes from Follow-ups.
- Track all Follow-ups and do not let anything fall through the cracks.

# A PERSONALIZED POST- PURCHASE EXPERIENCE

Follow-up is often the most overlooked step of the selling process. It is a small activity that can have a huge impact on the selling process and guest experience. This is where sales professionals can turn a great shopping experience into an exceptional one. It's how the top salespeople earn repeat business and referrals. It is important to remember that the guest's experience does not just end once the order is put into the system.

Some popular methods of post-purchase contact that can elevate the shopping experience are:

- **Thank You Cards**
- **Delivery Status Check-In**
- **Post-Delivery Calls**

A Thank You should be sent after the purchase. A handwritten Thank You is a significant gesture to show the guest you care.



**A personalized Thank You shows you took the time to write a letter specifically to that guest and you value both their time and business.**

# CHECK ON SUCCESSFUL FULFILLMENT

Creating a reminder to check on the **Delivery Status** of an order is an effective way to ensure the guest is aware of their current fulfillment status.

For a sizeable order with a delivery date several weeks or months in the future, create a reminder to double-check there were no delays affecting delivery times.

If there are anticipated delays, be proactive and contact the guest to let them know.

A post-delivery **Follow-up call** can serve several purposes.

Show the guest you care by ensuring they are happy with their new product and did not have any issues.

If they did have issues, it allows you to be proactive in trying to resolve the issues for them.



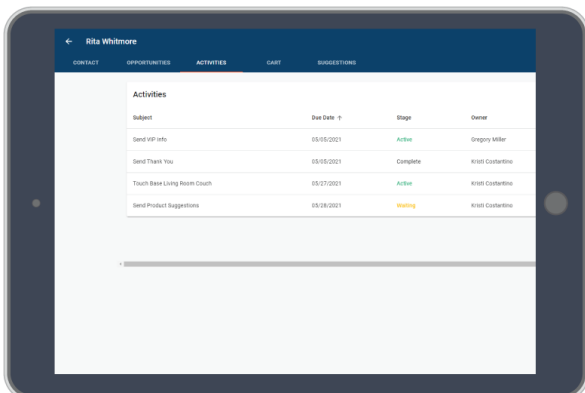


# ENSURING CUSTOMER SATISFACTION

**The goal is to keep the guest happy and prevent returns.** If they have no issues and love their new purchase, ask for referrals and inquire about any other rooms they may be aiming to furnish next. A post-delivery Follow-up call can be used to create prospective sales opportunities.

Log any future projects as an opportunity in STORIS NextGen CXM and confirm the next action item with the guest which can be entered as an Activity.

Remember, guests that have already been sold are some of the most important opportunities a sales professional has, especially if they delivered an exceptional shopping experience.





# THE OPPORTUNITY IS STILL ACTIVE

Even if the guest does not make a purchase, that does not mean that sales opportunity has ended. Many guests will have valid objections that need to be dealt with before purchasing.


While it would be ideal to see every guest purchase on their initial visit, there are many reasons they may decide to wait before committing to a purchase.

- **Guests may still want to shop around.**
- **Guests want to go home and retrieve accurate measurements for a particular space or room.**
- **Guest may want to speak with their spouse before making a large purchase.**

While this is likely to occur for a portion of your interactions, to ensure success you must enter the next step for the guest as an Activity in STORIS NextGen CXM before they leave the store.

Before the guest walks out the door, thank them for their time, and give them your business card. Confirm **when you will contact them next** as well as their **preferred method of communication**. Make sure you get the guest's contact information and update CXM so you have a way to quickly reach back out.





**Here are some examples  
of what a next step may  
be for a guest who did  
not purchase:**

- Follow up on Measurements**
- Invite Them to an Event**
- Call About a Promotion**
- Schedule an In-Store Appointment**

# Utilize your notes:

## CREATE AN MEMORABLE EXPERIENCE

Make sure to complete all next steps on their scheduled date. Regardless of the method of contact that guest prefers, **always remember to make your correspondence personalized, on-time, and valuable to the guest.**

Before reaching back out, read through your notes in the Opportunity and Relationship.

Be creative and avoid boilerplate messages. Make it specific for that guest, reinforce the value of what you are offering, and provide any additional information that could be beneficial in making their decision. Using all the notes you have entered in the Relationship and Opportunity can really make a difference.



# USE TECH TO STAY ON TRACK

It's human nature to think you will remember to do something in the moment, get busy, and then forget to complete the task weeks later. **STORIS NextGen CXM can help you stay organized and manage your next action items with a guest.** Whether the guest makes a purchase or not, there are always next steps.

If you tell a guest you are going to do something, make sure you do it. Forgetting to complete activities on time can reduce the trust a guest has in you and lead to a negative experience. If you truly believe what you are offering provides value to a guest, ensure you follow up with them.



**Track and manage next steps in CXM so you never let anything fall through the cracks and cost you a customer.**



# USE TECH TO STAY ON TRACK

It is important to make sure you update data within STORIS NextGen CXM.

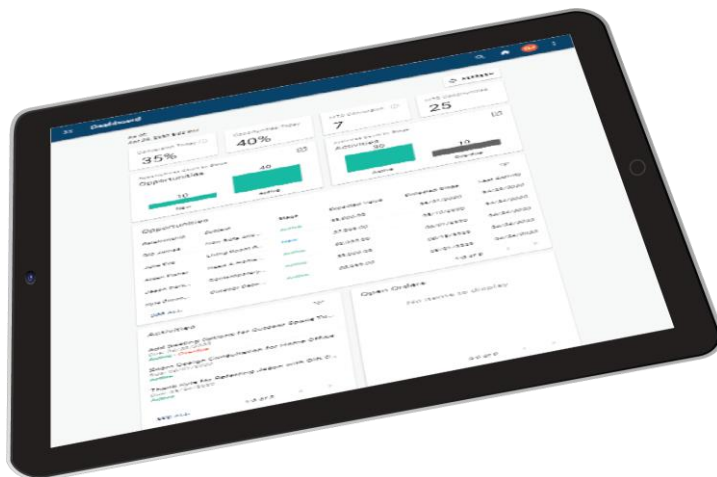
- **Update Activities and mark them as complete after you finish them.**
- **Create new Activities for any appointments or action items.**
- **Update or Close Opportunities as needed.**

**Maintaining the integrity of your data in CXM ensures your book of business and leads are accurate.**

Keeping data in CXM updated and relevant will ensure you do not forget any key steps as you build relationships with your customers.

Follow-up is not a secluded step that occurs in the distant future. It is a part of the selling process and the experience should not be considered over until Follow-up has been completed.

Remember, your goal should always be to earn a lifetime customer, not a single sale. A sale is a short-term win. A satisfied customer not only leads to a sale, but also to repeat business and referrals that will set you up for future success!



You are now armed with the insights to **sell successfully.**

Always Remember:



With your sales skills and STORIS NextGen tactics, you are ready to create unforgettable guest experiences.

**Happy Selling. You Got This!**