Window Coverings University

division of custEmers.com

"Seven Steps to Success"

Step # 1A

Consultant's Call to Make A Friend and Confirm Appointment

Key Points

1. Call within 24 hours after receiving inquiry/ appointment form.

2. This is your first chance to build a relationship . . . create rapport . . . to make a friend.

3. Create eager anticipation to meet you.

4. Lay foundation for two important questions and four critical questions.

5. Never pre-judge.

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When to Call

Appointment confirmation calls should be within 24 hours after the first customer contact if the designer has not met the customer before (call was taken by receptionist). If the customer entered the store and design consultant obtained information herself and knows the customer, a re-confirmation call should be made the day before to confirm that neither the customer nor the designer have had a change in plans. This sets a tone of professionalism and reliability. Now your customer will have more confidence in buy from you this time and to work with you in the future.

Purpose of the Call

1. Pre-sell the client so she eagerly looks forward to the designer's visit.
2. Remove fears that the designer will judge her home or existing furnishings, or will encourage her to throw everything out or spend big bucks.
3. To set out a game plan about "how we like to work" in comfortable, fuzzy terms.
4. To get a sense of the customer. What are her enthusiasms, hot buttons, and hesitations?
5. ***Learn about competitors and where she has been shopping for ideas.***
6. Refer customer to website: Helps her get ideas and clarify her own thinking . . . pre-sells and builds credibility.
7. Plant seeds for budget.

Second phone call to confirm information and appointment. 24 hours before appointment.

Customer Call Checklist

Friendly Things:

1. Are you new to the area or lived here awhile?
2. Are there family members to consider or is this for you alone?
3. Will we be working around your job schedule?
4. Look for things to connect
   - Kids in same school

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- Know someone where she or spouse work
- Know someone where she moved from

Decorating Points:

1. Room of interest?
2. Type of windows?
3. Current design treatment?
4. New furniture, carpet, or wall colors?
5. Color Preferences?
6. Solids, Pattern, Sheers?
7. What prompted the decorating?
8. Owned custom draperies before?
9. Given thought to budget range? (SOFT!)
10. Get Email address

"Qualifying" on the Phone

Always Qualify IN

Don't Qualify OUT

It is a privilege to be invited to a customer's home. Never pre-judge who is qualified to be a customer. No one is wise enough to judge people in advance. You will make as many wrong judgments as you make right ones.

The only fair thing to your customer and to you is NOT to pre-judge at all.

Law of "Pre-Judging"

Never pre-judge on the telephone whether to go on the appointment. Pre-judging requires "judging". When it comes to judging people no one is perfect, and few are good. Any of us who judge a person on the telephone about their desire to own quality window fashions is just as likely to be wrong as to be right. Top sales leaders never

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Two Important Questions

1. Would you like my input, or do you pretty well know what you want, and my job is just to help find it for you?

2. Have you had a chance to visit different stores and get some ideas, or have you had anyone else out to talk about window treatments?

Four Critical Questions

1. **WHO** – Must be present for Buying Decision? (Two Decisions)

   Who decides: Design / color / product? (Neighbor, relative, parent?)

   Who decides: Financial aspects? (Spouse, Parent?)

2. **WHEN** – Do you need your window treatments?

3. **WHY** – Are you buying window treatments NOW? (Something exciting must have happened!)

4. **BUDGET** – What is the budget you have in mind?

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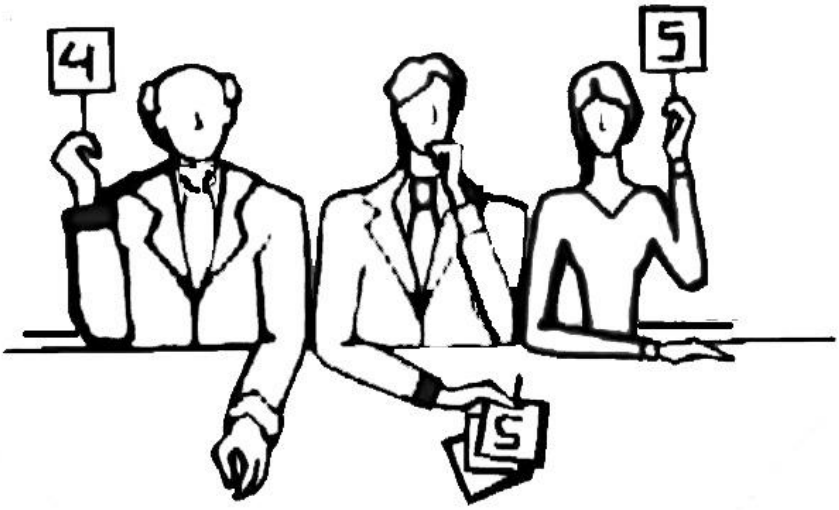
pre-judge a customer. Every face-to-face meeting is an opportunity not only to sell that person, but to earn future referrals.



Lifetime Value of a Customer

Every customer you sell – and many you do not sell – will refer you to others. Often your first sale is the smallest sale as customers "test" your reliability and service.

With repeat sales, and referrals from
friends, the lifetime value of a customer is $10,000
to over $20,000 during your career!

You Never Know a Customer's Desire for a Beautiful Home

There are many stories of mobile home customers buying over $5,000 to fix up their home... of retired postal workers in $50,000 homes spending $15,000 on decorating rather than move to a new home.

When you have a pleasing personality you will educate customers who call you for mini-blinds. You will tell them about the long term beauty and satisfaction they will experience with valances or custom draperies. There are stories of Grandmothers on a pension who cannot afford custom draperies, but because the design consultant was so friendly, she told her children and a big sale resulted.

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Favorite Stories about Design Consultants Going the Extra Mile

I have experienced many wonderful stories about window design consultants who never pre-judge customers. Here are two favorites:

Louise Carrol, Columbus, Georgia

Louise was called for a small window in a bathroom by a lady 60 miles away, up a back country mountain road. Louise hesitated, but she knew the policy was to go the customer's home without charge. When Louise arrived the customer took her to a room overlooking a magnificent mountain range. Her "bathroom window" was a 20 foot panorama of glass from floor to ceiling. The customer told her, "I just wanted to see if you would come all the way up here for a small job."

Bruce Bauman in Perryton, Texas

Bruce received a call from a widow on social security. He quickly realized there was no way he could sell her custom draperies even if he would sell to her at cost. She was disheartened, wanting so much to freshen her drab surroundings. Bruce told her to get her Sears Catalogue. When she returned with it, he helped her select ready-made draperies to fit her window. When they arrived he installed them professionally. Of course the look was beautiful. The lady was nearly in tears. Well, word got around the community about how Bruce helped her. Before long his business was growing by leaps and bounds.

Decide the Kind of Person You Will Be

Bottom line: Decide how you will live your life – judging others in advance before you know who they are or what they are about – or whether you will treat every person with equal respect, kindness, and friendship. Top designers give extra effort, the best they can for every person because that is the kind of person they choose to be.

Yes, Make a Connection

We all "click" with certain customers. You want to do that. On the telephone you may or may not click. Wait until you get to their home to decide. Sometimes an older person will view you as a sweet daughter. Sometimes a younger person will sees you as an aunt sharing good advice. Sometimes your customer will be a contemporary with similar interests. Maybe you are from the same home state, went to the same school, or know a friend in common. You will never know these things on the phone. You must

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meet your customer first. When you do connect, it can be the first step in a long-term relationship. When you want to do it you will find a way!

What About the Exception?

What about the customer who abuses your trust? The one who follows you around writing down your measurements so they can order on the Internet... or wants to keep your sample so they can go to an over-the-counter fabric store... or the customer who misleads you and does not tell the truth?

Yes, some customers will abuse your trust. But these are in the minority. There are ways to deal with these customers. Your company policies on samples and sales techniques will deal with most of these.

The most important thing to remember is that when your guard is up, you have already lost. Sure, you can protect yourself from being abused. But as you do, you also protect yourself from many wonderful customers that will stay with you for a lifetime.

	Never pre-qualify whether a customer is "worth your time" for an appointment!

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Professional Selling System

Phone Call # 1A

***STEP # 1*:** Phone Call # 1A - Make-A-Friend…Building a Relationship

PRIOR TO APPOINTMENT

First phone call - build rapport

An overview of the system and its inner workings follows. It all begins when a customer calls the office or walks in a store. Any qualified employee may take the initial call. An answering service or voice mail may take the call.

Wherever possible, an appointment should be set immediately. Then, the sales consultant should call the client within 24 hours to set the stage for the house appointment and the project.

Preparation checklist – First Phone Call

- ***Be in the correct frame of mind and have ample time to make a friend with the client.***
- Have Appointment Information Form in front of you.
- Have plenty of paper and pen for notes!

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First Phone Call – Example and Script

Introduce Yourself – Make-A-Friend

Mrs. Jones, this is Jo Ann with Speaking of Windows. I will be working with you on your window treatments. Do you have a few minutes to talk and get acquainted?

Probe for Motive – Why Is She Changing Now?

Great. I'm really excited about working with you on your living room window treatments. You must be excited too? Have you been thinking about this project for a while? Great, well tell me about your project.

Is there something exciting happening that I need to be aware of? Is there a specific timeline for the project? Oh, that's exciting! We will want to be sure to have everything completed in time. I'm glad you called now. We will need to get moving right away and complete this project so you have time to complete the other details before your event.

Who –

Who Will Make the Design Decision?

Who Will Make the Money Decision?

I often find that there might be someone you would like to have at the appointment when we select the products, fabris and colors. Is there anyone that you would like to have see your choices before we proceed with your order? Great. We'll want to be sure to get together when all three of us can be there. Is the time that was previously set up going to work? No problem, we'll reschedule so that everyone who needs to be there will be there.

Quite often I also find that there are other parties involved in the financial decision. Will anyone else in your family be involved in approving the finances? Great, then it would be helpful if they were also available when we meet.

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When would be a good time for all of us to get together? I'll be happy to arrange things so everyone who needs to be a part of the process can be. When is a good time?

Wonderful. In thinking about the decorating decision, do you have any specific ideas in mind? Have you had a chance to look around yet and get some ideas about what you like and dislike? Tell me about your experience?

So, from a decorating standpoint you are thinking (repeat back what you heard her say). *Well, that sounds like a possibility. Have you pretty much decided upon that or are you also open to ideas and suggestions? Wonderful. I'll come with lots of ideas.*

Plant Seeds for Budget

From the standpoint of finances, most people like to have some idea of what things cost. Would you be interested to know some ideas of treatments and costs? Great. Let me tell you first of all, that we always will do our best to work within your budget. To give you an idea of approximate costs, let's consider this as a starting point.

Usually a single three-foot wide window will come out something like this. If we were to put a single layer of treatment at the window, something like a blind or shade that offers great privacy and light control and is very functional, we would have several choices of products, styles and colors. We would probably be looking at costs anywhere from about $2-600 per window.

When we add some fabric for impact and a more completed look, with a layer of either draperies or top treatments, the options offer an opportunity to be more decorative and reflect more of your personality into the room. A double layer treatment with drapery or top treatment over a blind would generally run in the range of $6-1200 per single window.

And, when you really want to decorate the room, we can create a beautiful three layer treatment, including blinds or shades, beautiful draperies, distinctive top treatments with

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trims and embellishments and those types of treatments might run in the $1200-3000 range or more.

Before we talk again. It would be helpful for you to think about and discuss these options with your family so we can be clear about where we would like to be. That way, I'll be able to do the best possible job for you and stay within your budget requirements.

How the Process Works

Here's how we normally proceed. I'll be coming out on Tuesday at 4:00. Your sister and your husband will be joining us to help in selecting colors and making the financial decision. I will have all the samples with me and at that time we will make our selections, I will measure, price everything out and we'll be ready to move ahead with your decision and get your order going.

Do You Have Any Questions?

I*n the meantime, I'd like for you to check our Website at www.xxxxxxxxxx.com It will also explain how we will work together, to create beautiful rooms within your budget. And it details our four-way guarantee on quality, price, performance, and our on time guarantee.*

Well, Mrs. Jones, I am really excited about working with you and can't wait to get together with you and get started. I'll call to be sure everything is a go, before Tuesday and we'll get your project under way!

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PLANTING SEEDS FOR BUDGET

First Phone Call – 24 hours after appointment is set

Concept: Give the client some ideas of types of different approaches to treating the window, and anticipated price ranges involved. Ask the client to think about it and discuss with her family. Tell her that the next time you talk, you will need to have some idea of her thoughts, so that you will be certain to bring the right samples and have some great ideas about how to treat her windows.

Option One (Good)	**Option Two (Better)**	**Option Three (Best)**
Functional	**More Decorative**	**Complete Window Design**
Privacy & light control	Privacy, light control & some fabric	Privacy, light, control, fabric and design
Variety of products, styles and colors	Variety of products, styles, colors, choice of side panels or top treatment	Variety of product, styles, colors, unlimited designer choices.
A nice gift box	More personal touch to reflect your personality	More personal touch to reflect your personality
	Fabric to add style and design	Fabric to add style and design
	A gift box with beautiful wrapping	Unique, distinctive designs with embellishments and design details
		A nice gift box with beautiful wrapping and a fabulous bow to complete the package.
$200-600 Single window	**$600 – 1200** Single window	**$1200 - $3000** Per window

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Business Name	Job Sold date_____	$
Decorator Name	E-Mail	
Database Login	DB System	

Customer Name		Street	Date
H. Phone		City	
B. Phone		State Zip	Booker
Cell Phone	E-Mail		

Appointment: Day _____ **Date**_____ **Time** _____

Consultant _____

Directions:_____

LEAD SOURCE	
	Newspaper
	NP Inserts
	Yellow Pages
	Television
	Radio
	Direct Mail
	Customer Mail
	Welcome Serv
	National Adv.
	N.Hood Flyers
	Van
	Prospecting
	Store W.I.
	Referral
	Ref by
	Other
	Other
	Other
	Other
	Unknown
	Prior Cust

WHO (Design AND Money)

WHEN (Special Event? Search for urgency)

WHY NOW (What exciting thing happened?)

Competition (Seen any ideas you like?)

Budget (Plant seeds)

Notes

Products and Rooms of interest

Interest	LRM	DRM	FAM	MBR	KTN	BthR	Comments
Draperies							
Bedspreads							
Upholstery							
Blinds							
Shadings							
Shutters							
Other							
Other							

Appointment_Form-New_10(1)(1).22.04-Alt22037618079.xls Alternate

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