





**A comprehensive
business system overview**
*A step-by-step program to help
dealers hire, train and support
sales consultants for superior
long-term business success*

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NOT FOR RE-SALE

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Preface

As a customer, wouldn't it be nice to feel sincerely welcomed and appreciated whenever you visited a retailer? As a retailer, wouldn't it be nice if your business was clearly differentiated from others in your market and your reputation in the community rivaled the best of the best? Isn't each of these questions tied to one another?

Wouldn't it be nice if you had something that needed repair, or some warranty work that needed to be done, and you knew that the retailer would take care of you with as much enthusiasm and commitment as they might if you were making a big purchase? What if you contacted a retailer who really tried and succeeded to understand your needs and found the ideal solution that satisfied your needs well beyond your expectations? And what if you knew the minute you contacted this retailer that you could trust them explicitly?

For years, I went to a small auto repair shop to service my car. I have referred many clients to this shop and those clients have done the same. My loyalty was established right away when I specifically asked the owner to put new brakes on my car since they were making unusual squeaking sounds and hadn't been replaced for years. He drove the car and told me that I didn't need new brakes because the noise was related to the brake pad particles in the brake drum. He said all that I needed to do was back up and hit the brakes a few times and it would clear out. Sure enough, it worked! Over the next year, I made two additional requests to have new brakes put on only to have him adamantly refuse to do it! Then one day I went in to get the oil changed and he told me it was time for new brakes. I was so excited and I thanked him, never questioned the price for the brakes or any other thing he ever told me needed to be fixed on any of my vehicles. He earned my trust, respect and friendship. Bringing my car to him for service was always a truly satisfying experience.

This retailer clearly differentiated his service from any other car service company I had used in the past. Wouldn't it be nice if you could differentiate yourself from every other competitor in your market and have customers feel the same way? Do you think this would also impact your employees? And do you think your reputation in your community would stand out above nearly all other businesses? You know the answers to those questions, but you may not know the best way to make this a reality.

You may be a retailer or a fabricator; a service provider or part of Hunter Douglas; *regardless of your role in the distribution channel and your position within your company, you ultimately contribute to the customer's experience.* That means you are in some way essential to the process of ensuring that customers have a thoroughly satisfying shopping experience. This program will pave the way for you to manage your customer's experience. It will pave the way for long-term success and it will deliver benefits in every area of your business, career and even your personal life. These are bold claims to make, but I believe that they are realistic claims. By committing to the implementation of this program you will have an awesome business!

What is the Professional Customer Management ProgramSM (PCMP)?

The PCMP program is a system that integrates the activities of your staff with your customers, wherever customers are in the buying process – before, during and after the sale – to support the selling effort, better manage the customer's experience and maximize results. It's designed to give your customers an "exclusive" experience with your business. By doing so, you can expect to:

- More thoroughly satisfy *ALL* your customers so they're more likely to:
 - Purchase more and/or better products
 - Become long-term repeat customers
 - Refer more of their friends and family
- Maximize your results by:
 - not leaving money on the table
 - not working harder than you need to
 - not spending time with the "wrong" customers
 - thoroughly satisfying all your customers

PCMP supports your business by helping you:

- Hire the right staff to assist your customers
- Spend less on advertising by generating more business from previous customers and their referrals and being less dependent on generating new customers from traditional advertising
- Ensure your customers have a rewarding experience at every contact point they have with your business
- Capitalize on every opportunity to meet a customer's needs by determining the customer's real needs, meeting those needs, then ensuring the customer made the right decision after the purchase is completed
- Implement an effective and consistent system to confirm that customers are happy, willing to shop with you again and likely to tell others to do the same

You'll learn how to:

- Establish a set of logically-sequenced activities that work together to manage the customer satisfaction experience
- Stay in contact with customers during the critical "blackout" period between purchases
- Follow up with every customer to find out if he or she is really satisfied
- Track every inquiry, quote and customer that touches your business
- Manage all the points of influence in the customer buying process even when a customer doesn't follow the typical buying steps, so you don't lose leads and quotes
- Track performance and effectiveness of various operations in your business
- Better organize your sales and marketing efforts
- Better train your employees to assist staff and to learn the process of thoroughly satisfying the customer

The PCMP will help transform your business into an awesome customer satisfaction machine, but you must be willing and able to:

- Improve the way you do things in your business
- Ask your staff to learn a new way of doing things
- Get buy-in from your staff to make this work
- Review your systems or adopt new ones to support this system



A stylized, handwritten signature in black ink, appearing to read 'Jeff Janke'.

Jeff Janke

Introduction

Can you even remember the last time you had a great shopping experience or is it something you can only imagine? For the most part we've become accustomed to figuring out our own needs, then determining the best way to meet those needs. That's why we're often frustrated by our choices after a purchase and the lack of assistance we received from the retailer. It's nearly impossible for us to uncover our "real" needs for major purchases when you consider our lack of time and our information overload. We need help whether we admit it or not!

True customer service isn't limited to telling customers where things are in the store or reciting policies about returns or guarantees. It's viewing every customer as unique. It's ensuring that customers have a rewarding experience at every contact point they have with your business, including their experience with the product or service you sell them long after the purchase is completed. In fact, the "sale" continues until a customer returns to your store to buy again. When that happens, it's strong evidence that the customer was satisfied with her prior experience. The period of time between the sale and when the customer returns is the "satisfaction test" and is nearly always ignored by retailers. It could be called the "blackout period" because the retailer loses touch with customers and essentially assumes they're satisfied. That's a bad idea.

Rekindling the selling process and restoring it to its rightful place in the retail arena is the key to differentiating your business. The optimal way to approach this opportunity is to adopt a process that ensures that customers have the best chance to experience satisfaction at every turn. That means "selling" customers satisfaction before, during and after the sale – that's what "selling" is all about. You're about to view your business from an entirely new perspective. We're not just going to tell you how it should be; we're going to show you a comprehensive business system to help you elevate your business beyond your wildest dreams!

Satisfaction Test:

The period of time from when you make the sale until the customer returns.

All the Puzzle Pieces

Marketing is based on the process of finding your customers' needs and filling those needs. The basic rule in business is to satisfy customers during that process. That mandates how you need to manage your customer's experience. The bottom line is that you can have all the pieces of the "marketing" right, but if you can't manage customers' experience to their satisfaction, you lose even if the customer made a purchase. Management of that process requires systems to help you coordinate activities and people (staff) to match your product offering with the needs of the customer. If customers like you people and your products, but your systems are difficult, they may not complete the selling process. If customers don't like the way your staff responds to them, a similar fate is assured - regardless of your great products and systems! No business can function efficiently and effectively over the long-term without well-planned systems that provide the right information and logically-sequenced activities that work together to support both staff and customers. There are many components that not only improve the customer's experience but add value on all levels. We have found that the top components are hiring the right people, providing the tools and training needed to make your staff effective, having programs and systems to measure progress, and compensating staff in away that reflects their contributions to the success of the business.

Think about any business you frequent and how both the systems and people must work in concert to make you return. If you go to a restaurant where the food is great but the service is terrible, you may not return as frequently as you might if both worked in concert. If the service is good and the food is horrible, you probably have even less tolerance! This example makes it easy to see that if the systems are great but the people don't perform properly, the result will be failure. That's why it's important to have a good system and the right staff utilizing the systems as intended. Systems require ongoing attention and staff requires ongoing training.

Our goal is to provide our dealers with the comprehensive business systems they need, to help them hire the right type of people and offer training programs to tie the "systems" and the "people" together. Ambitious? You bet it is, but desperately needed – especially when you consider the state of our industry!



Marketing and Advertising

Marketing helps you figure out who your customers are and where they live; advertising is an attempt to reach them. Marketing tells you what they might need; selling meets those needs. Marketing tells you what makes your customers satisfied; publicity documents the experience they have – good or bad. Marketing will tell you what customers expect after the sale (guarantee, service, repair, etc.); customer service meets those needs and publicity will once again document the results. Ultimately the customer will determine how successful you are in the entire process. Satisfaction will bring them back.

There's a direct relationship between how successfully you satisfy your customers and the cost of your advertising. The more sales a business gets from and through existing customers, the less the business has to depend on new customers. Not only will customers be happier, but you will also reap the rewards at every turn. Advertising can go from being a frustrating "hit or miss" proposition to a fun and rewarding opportunity that feels more like an investment than an expense. It also becomes less relevant in your quest for new customers. Dealers have told me that they experience up to 80% of their business as repeat/referral sales when they focus on customer satisfaction!

It's clearly possible to generate all new business from previous customers. This virtually eliminates the dependency to generate new customers from traditional advertising. Advertising can be modified to focus on reminding previous customers about their satisfying experience and validating the reasons they bought in the first place! Advertising can be less frustrating and more about your image than about discounting and coupons, and it can be more focused on your previous customers who are by far the best advertising medium in the first place.

For example, you could begin advertising on cable TV to remind previous customers about their experience, and they would respond! If you never advertised on TV and suddenly began an "image" ad campaign, you would get calls, emails, even letters from people you haven't heard from in years! Advertising could take on a whole new meaning!

Do you follow up with every customer to find out if he or she is really satisfied? This point of influence is a huge opportunity to reduce your dependence on advertising and make the advertising you do more effective! If you grow and nurture your "fan club," your advertising as a percentage of sales will decrease. Not only will you generate new business, you'll enhance your reputation in your market.

The Hunter Douglas Internet Customer Management (iCM) system has been created specifically for Hunter Douglas retailers to make the customer's experience the best it can be! It supports the notion that EACH customer is entitled to be serviced and remembered long after the sale is forgotten.



Selling

We tend to think of selling as pushy, inconsiderate, insensitive and flat-out bad for customers. Considering the fact that selling has essentially become obsolete in retail, it's no wonder that we shy away from the word and the concept of selling, as it is perceived today. In fact, selling is more natural than most people think. The basis for selling is determining a customer's real needs (Assessment), meeting those needs with your retail offering (Selection) and then ensuring that the customer made the right decision after the purchase was completed (Confirming Satisfaction). The goal of your business is to get and keep customers. To do that, you have to satisfy them. To satisfy them, you have to understand their true needs and meet those needs with the best "retail offering" that your business is capable of delivering – or directing them toward a better solution. It's not the product that's remembered after the sale; it's the experience they have getting it.

We've done more than 3,000 dealer audits (mystery shops) on dealers throughout the United States in an effort to understand what's important to the customer and what impacts their experience. Although there were many positive reports by consumers, the chart shows a summary of what consumers reported. The PCMP Selling System has been specifically built to document the steps that the most successful window covering retailers follow in order to thoroughly satisfy customers.

Store Audit Summary % through 12/31/2005	SAH%	SHR%
Number of Dealers	368	1196
Initial Greeting (Phone Call)	86%	88%
Needs Assessment	91%	80%
Setting an Appointment	75%	N/A
Invitation to Store	N/A	72%
Store Exterior	N/A	70%
Arrival (SAH - at customer's home)	63%	N/A
Initial Contact	67%	65%
Store Interior	N/A	73%
HD Displays	70%	73%
Employee Presentation	77%	68%
Exit	62%	34%
Overall Impression	74%	71%
Grand Total	73%	70%

One common mistake most businesses make is to assume that they have what best meets the needs of all customers. And by the mere act of buying it, they will be satisfied. Sometimes we serve our customers better by not selling them something that marginally meets their needs, but instead recommend another retailer that might better suit their needs (like Macy's policy in *Miracle on 34th Street*). With that kind of recommendation we have in fact "sold" them. The chance that they will return or recommend us in the future is highly probable, certainly when you consider how they would feel if you sold them something they became dissatisfied with over time. In fact, for our part in the customer's quest for a solution, we have satisfied them – possibly to a greater degree than the retailer who ended up with the sale. Wouldn't it be interesting to call the customer you sent to another retailer a few days later to ask if he or she was satisfied? What impact would that have on that customer, your business and your future sales? The answer is obvious, but since the "payoff" for this kind of service is more long-term, we don't feel the short-term boost in our sales; therefore, we opt for instant gratification. In other words, we think more about our business than our customer. If you're building a business for the long-term, that needs to be adjusted to build long-term success.

The Ideal Customer

Let's look at our typical customers and the process we use to service them. When potential customers inquire about our products, we expect them to make an appointment (in-store or in-home). We then provide an estimate and expect them to place an order. When they do, we arrange an installation and assume customers are satisfied once it's completed properly. This is the way we perceive the process, so we develop systems and hire people to manage this customer experience with our business. Let's take a look at this visually:

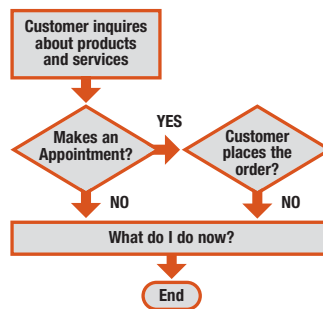


If everything goes according to plan and the customer follows the "yellow brick road," we tend to think this is the ideal customer. The customer may even appear to be feeling pretty good too! However, when something changes along the way, the real challenge begins, and these situations create the Points Of Influence (POI) that separate one retailer from another. What do you do if a customer inquires and doesn't make an appointment? What happens with that customer inquiry?



What happens when you provide an estimate to customers and they don't buy? Better yet, what do you do when the installation is complete and they're not really satisfied? Many business owners say, "If I don't hear from them, they must be satisfied." This is not necessarily true, is it? You should not allow your customers to have a "blackout" period. Most customers won't tell you they are not satisfied; they will simply live with their dissatisfactions and never buy from you again or recommend you to anyone. In fact, they may go so far as to tell other people in the neighborhood not to buy from you!

You need to implement effective and consistent systems to confirm that, in fact, customers are happy, willing to shop with you again and likely to tell others to do the same. To do this, you must stand back and review the customer's experience from the time they contacted you through the final installation and beyond. Did they enjoy the interaction with your business? Was it memorable? If they didn't buy from you — why not? You must have systems that support the process when one step doesn't follow another as described above. It's imperative that you capitalize on every opportunity to meet the needs of your customers, especially when they don't follow the yellow brick road! And remember, this road doesn't always deliver what the customer expects, so you must be prepared to meet the needs of your customer in the end — just ask the Tin Man! Let's review this visually:



Unfortunately, most retailers don't know what to do when a customer doesn't follow the "typical" steps as described above. Or they know what to do but don't have the ways and means to do it. Because of this, many leads and outstanding quotes are lost. Considering that, you need a system to track every inquiry, quote and customer that touches your business and track the customer through resolution. What do you do to nurture a quote or a previous customer for repeat business? What do you do when a customer visits your store and leaves without making an appointment or placing an order? Do you have a system to get their name, address, and phone number on a regular basis? Don't you think they would want you to follow up — after all, isn't that part of the customer satisfaction process?

Benefits of Satisfying Customers

It doesn't take much to notice that everywhere you go customer service and selling are the exception and not the rule. This rings loud and clear and should strike a note in you that effective customer service and selling are clearly the way to differentiate your business from any other business, but more specifically from your competition. It's hard to imagine that any "box" store would achieve superior customer service levels. But when you consider what Nordstrom has achieved in the minds of nearly every consumer, you know they have figured out how to make their business model different — to work on the next sale every time they sell a customer. They bring customers back and get customers telling others about their experience. In short, they thoroughly satisfy their customers! How often do you see Nordstrom advertise or have sales relative to their competition?

The most obvious benefits are familiar, but they're worth repeating. If your customers are more thoroughly satisfied, they are more likely to:

- Purchase more and/or better products at the time of sale
- Become long-term repeat customers
- Refer more of their friends and family

Disciplining yourself to use a system that integrates the activities of your staff with your customers is the essence of your business culture. Once such a system is in place, training, feedback and performance become the priority. Managing the system is, in effect, managing the customer's experience. When you do this well, you're sure to see:

- Increased repeat / referral customers
- Increased close ratio
- Increased average order
- A better product mix
- Increased sales – employee earning potential
- Increased employee morale and productivity
- An incredible reputation in your community
- A more profitable business
- A greater pride of ownership
- A more thoroughly satisfied customer

Essentially, it's the most win-win program you can institute – everyone is happier and more satisfied, and everything you do seems to benefit someone in some way!

It All Works Together

To get outstanding results you need outstanding systems and, most of all, an outstanding team. That's no big revelation, but stop and compare it with your current situation. Chances are your business has room for improvement. It's more than likely you haven't reviewed what you do from the outside looking in for a long time. If you're too busy to review it, you're probably leaving money on the table, working harder than you need to and not thoroughly satisfying all your customers. If you're not as busy as you'd like to be, you absolutely need to review what you're doing and do it better. The Professional Customer Management Program (PCMP) provides a process that ensures a business model to maximize your results. The program's framework is based on the following business formula:



The centerpiece of the Professional Customer Management Program is the selling program. However, as with any selling program, you must also build the right systems and the right team to support your selling effort. If you ask salespeople to follow up on their quotes, you need a system that organizes this part of the process and assists salespeople with this function. If you want your showroom manager to send mail to previous customers or to customers who inquire about your products through the web site, you must have a system to organize the process, track performance and measure the effectiveness of the effort. The Internet Customer Management System (iCM) works with PCMP to address these functions and more, as it integrates them into an effective business model.

Here's what it impacts:

System Management

- **Advertising**
 - Customer initiated inquiries
 - New leads through advertising
 - New leads through existing contacts/customers
 - Previous customer contacts
- **Operations**
 - Administration
 - Computer systems
(scheduling, follow up, Customer Management, etc.)
 - Order processing
 - Communications (phone, voice mail, email, Internet, fax, etc.)
- **Selling**
 - Sales process
 - Customer service
 - Customer feedback

People Management

- **Recruiting new employees**
 - Type of ads and placement
 - Interviewing
 - Testing
- **Hiring**
 - Employee orientation
 - Employee handbook
 - Terms of employment
 - Compensation
- **Training programs**
 - Product offerings
 - Selling
 - Operations

Results Management

- **Business Management**
 - Tracking the results of your systems
 - Monitoring the activities of your customers
 - Managing your staff
- **Marketing and Advertising**
 - Reaching the right customers
 - Getting the most from previous customers
- **Monitoring and Reporting**
 - Margins and Profits
 - Cash flow

If you think that the activities above account for most everything in your business model, you're right. In fact, nearly everything you or your staff does has an impact on all the above areas. For example, it's one thing to have a good product selection for your customers, but if you didn't hire the right salesperson, everything will be affected. That's why we address this need and incorporate an entire section on hiring and training your staff. We don't stop there either, because it's not just about whom you hire but how you hire and what kind of ads you might use to find qualified candidates.

When you do find qualified candidates, how should they be oriented to your business and what type of training should you provide? If you don't have a training program, you'll limit your choice to experienced candidates and, with that, comes someone else's "way" of doing things. More importantly, since sales functions are also performed in the home, it's difficult to monitor and train salespeople, leaving them feeling isolated and on their own when, in fact, they want and need to be managed. After all, they want high average sales and close ratios just as much as you do!

Since the selling process is one of the most important parts of the PCMP, it dictates many other PCMP systems and people functions. The first step to understand the value of this program and how it works is to understand the selling process. One thing is certain, this part of the program is bound to generate new ideas for your business whether you adopt the PCMP or not!

Adopt a Comfortable Selling Program

Our long-term vision is for each dealer to have a highly trained sales staff who can “sell” the products. The selling part is easy. Making money on what you sell is the hard part. If it’s true that you sell what you’re comfortable with, it makes sense to find ways to get comfortable with the products that meet customer’s needs and are profitable for your business. What a concept! At the end of the day, we want customers to have more unique, functional and fashionable products in their home to make them proud every time someone says, “This is really nice, where did you get it?”

Selling is a natural process when it’s understood. Analyzing how to do it efficiently, consistently and with the desired result is unnatural. When we think of being successful in selling, we think of making the sale. Yet sometimes making the sale is the wrong thing to do for the customer. What is natural is assisting people with the process of satisfying their need. Sometimes that means directing them elsewhere. They’re happy that you assisted them, and you’re happy that you didn’t “sell” them something that wouldn’t meet their needs. Removing the pressure that you must “sell” something to every customer you come in contact with immediately makes the selling process more natural, because you know that all you need to do is **what’s best for the customer**. Find out what they really need – you either have a good solution or you don’t. At the very least the customer understands their needs better . . . making their experience with you memorable. Viewing the selling process in these terms removes the negative connotation normally associated with sales and replaces it with a natural inclination to help others get what they want and feel good. In simple terms, this process has three components:

- Getting to know the customer
- Meeting his or her needs
- Building a long-term valued relationship

If you stop to think about any relationship you have, you’ll realize how this formula applies. When you get to know people and they feel you understand them, they begin to open up to you and rely on you for support, advice, comfort, etc. That meets their needs at the time. If you do it well and maintain contact, the relationship is valued and grows. It’s a natural progression that’s mutually beneficial and continues to build.

Doing what’s best for the customer makes the selling process more natural

Do you remember a teacher you had in school who really connected with you – or so it seemed? The class was interesting and made perfect sense to you, and you felt good about the learning experience. Chances are that teacher clearly understood his or her students’ needs (what they knew and didn’t know) and prepared the class work to meet those needs in a constructive and creative way. That teacher learned about where students were in the learning process, identified their needs and met those needs to the students’ satisfaction. Those are the teachers who kept track of their students, and their students stayed in contact with them. I remember my eleventh grade Algebra II teacher very well. Mr. Glasser was tough on all of us, but you knew he really wanted you to learn and understand math. I did and, as a result, I have benefited throughout my career!

The products you offer to your customers are, for the most part, not understood by them. Customers need to be educated about what your products are and how they work. Retailers, who assume that customers not only understand their needs but also know what they want, have little chance to thoroughly satisfy their customers. Imagine a customer walking into your store and saying, “I want wood blinds.” You say what color and she says “white.” You say how many and she says, “I need six and here are the sizes,” so you write up the order and after they’re installed the customer thinks they’re too heavy for her mother to pull up over the sliding door. Is she satisfied with you? It’s your job to assist customers to identify their real needs (getting to know them), then educate them on the choices available, including your recommendation for the best choice. Don’t think any differently; this is truly an “educational” sale. Once you begin to see sales as education, you’ll realize that viewing your role as a “teacher” may be more compelling and natural than thinking you’re just “selling” something to a customer.

Sales = Education

It's natural for us to meet someone and provide information because we believe they want it and are asking for it, but we become frightened to think we're "pushing" ourselves on them. For you to get into this "natural" mode, you have to gain a customer's confidence and trust. That starts with knowing your products extremely well because it's the confidence that you have that creates the confidence they have. Then you must learn to ask customers questions to make them aware you're interested in understanding their real needs and not just interested in selling them something.

You can take specific steps to ensure that this process provides both you and your customer with a pleasant and thoroughly satisfying experience – so much so that your customer wants to return over and over and encourages others to enjoy the same experience. This is natural, don't you think?

Following are the 12 Steps that will build your business into an awesome "customer satisfaction machine" regardless of what you sell (carpet, shades, tinting, furniture, paint). By applying these steps and supporting them with the appropriate tools (computer system, operational systems, marketing system, etc.), you can transform your business like no other competitor can – big or small! It is the basis for differentiating your business from all others because you are providing your customers with an "exclusive" experience.

These steps are patterned after the book *The Selling Bible*, by Mr. John Lawhon, and are the result of years of research and testing. This book is one of the best accounts written about the details in the selling process. Customer Relations elements throughout the system were inspired by Mr. Bob Phibbs, better known as "The Retail Doctor" and author of the book *You Can Compete*. We strongly encourage anyone who intends to follow this program to read and reread these books.

Let's begin with the first part of this selling process – Getting to know your customer.

Phase I: Getting to Know Your Customer

If you have a showroom, the first thing you need to do is make a store visit a more important part of the selling process. Dealers report that including this step in the process not only results in greater profit, but also makes the business more productive. Afterall, if you have a showroom, why not use it? The in-store visit is an advantage you have over many of your competitors. Very few dealers can compete with the experience your customers have when they visit your store, but **nearly all dealers** can compete with you when the sale is attempted solely in the home.

There is no doubt that sales (great sales) can and are made in the home, but it requires a more skillful process for any salesperson. Having working samples for the customer to touch, operate and visualize is always recommended. Whether you meet in-home or in-store, the first time you meet the customer is your opportunity to clearly differentiate yourself from the competition.

1. Greeting Your Customer (Initial Impression)

Establishing communication sets the tone for the experience customers are going to have with you and your business. It formulates their expectations and perceptions about the experience. Appearance, body language, presentation materials, medium (voice mail, email, letter, etc.) and eye contact are more important than the words or phrases you use in your initial communications with your customers. Just because a customer doesn't say anything about your appearance doesn't mean they approve. If you're not getting compliments you're not dressing properly. This is all part of the experience of the sale and it needs to be memorable in a positive way.

Equally important is the introduction of the customer to your company. Whether a customer has contacted your business in the past or for the first time, you need to acquaint her with the product offerings and point out where everything is located. Show her what you think might be of interest. Tell her how long you've been in business and about your company values and policies; maybe show some publicity about your company that was published by the local paper or anything else that may be of interest.

When customers have made an appointment for window fashions it's absolutely essential that you give them a product tour and provide an overview of the choices. It's a way to introduce the brands that you carry and tell them a bit about the company and its history. It makes them feel more comfortable about buying products from a company they find interesting and stable. It also makes customers feel like you really know your products! If you go to the home it's even more important that you tell them about your business. Using pictures, articles, brand logos, explaining guarantee benefits and purchasing options should be the first part of your presentation.

During this short 5 - 10 minute overview customers will react to different products and information that you provide. They will give you clues about their likes and dislikes which leads you to your next step – assessment and information gathering!

2. Assessment and Information Gathering

The skill and effort you apply at this step most likely determines the amount of work you will have to perform to satisfy the customer. Customers absolutely don't know all their needs at the time they begin their shopping experience. It's through skillful questioning and comfortable interaction that they are carefully led to understand all the factors that are really important to their long-term satisfaction.

For example, you may find that shutters best meet a customer's needs based on the input you gather at this step. However, the customer needs the product in a week for a special occasion and her budget only covers half the selling price. In this case, you may be able to use financing to meet the budget requirement but may not be able to meet the delivery timetable. If shutters turn out to be the "perfect" long-term solution, perhaps a temporary solution can be arranged. Do you see how important assessment and information gathering is during this step of the process?

Once those needs are uncovered, it's important your solutions fit the customer's lifestyle, budget and delivery expectations. It's also important to know who the "decision maker" is or who may need to be involved in the decision to make the purchase.

3. Exposing Current Dissatisfaction Levels

You can uncover the dissatisfaction of a customer's current situation or one she had in the past by discussing experiences that may have been unpleasant and annoying or product attributes that simply didn't do the job the customer expected. For example, the customer may dislike cleaning and despise the dust that accumulated on the horizontal blinds. Or maybe the customer didn't like the light coming through a honeycomb shade in the morning. Sometimes a product (such as a shutter) looks beautiful, but interferes with the function of the window or opens too far into the room. Consumers become dissatisfied with a myriad of things after their purchase and, although it's impossible to figure them all out, it is important to dig as deeply as you can to raise the level of dissatisfaction with the products customers have now or have had in the past. This increases the chance that they want something better; that they will be more involved in the selection you recommend and that they will be more likely to purchase from you. This step establishes credibility. You come across as the expert and they want to buy into the solution immediately! Everyone wins if you take the time to complete this step.

Phase II: Meeting Your Customer's Needs

When the first three steps are performed, then the fun begins because there's hardly anything more fun than watching customers find the best solution for their needs and then ask you for the order.

4. Choices

Selecting at least two products (and preferably three) that meet the customer's needs, based on how you understood them during Steps 2 and 3, gives a customer choices that allow her to compare and contrast the products you have chosen. This part of the presentation also gives you feedback that either validates your final recommendation or allows you to re-evaluate your solution by identifying any additional needs you might have missed in Step 2 or Step 3.

Make sure that any choice you propose is one that will work – not one that won't. Customers like to feel part of the decision and this step gives them that opportunity. It also makes the customer feel that you're not just trying to "sell" a specific solution because it may suit your business; in other words a product that means more profit for you. End your CHOICES step with the choice that you are going to recommend and present in Step 5.

5. Presentation and Demonstration

One of the most critical skills to develop as a salesperson is presentation of the product that you ultimately select for the customer based on qualifying and assessing their needs. This step requires that you have product expertise and an intimate understanding of product features, benefits and advantages for the application. You must also know the background of the manufacturer and the competitive products in the marketplace (whether you carry them or not). This gives the customer the feeling that you know your products, and she assumes that you've been in the industry for a while – it builds trust!

While you're making your presentation to the customer, you may be interrupted at any time to write the order, which is the next step. If that is the case, write the order (or record her choice on a "preliminary order") and then continue to step 7 and complete the presentation. It's absolutely essential to complete the presentation and demonstration on the product and/or service. This ensures that the customer is fully aware of all the features the product offers because some

features turn into unexpected or needed benefits in the future. It gives the customer more positive selling features than she may have thought were available, reinforcing her decision and her satisfaction.

The sooner the customer wants you to write up the order during this step, the better – for two reasons! First, it's a clear indication she believes you did a great job assessing her real needs whether she verbalizes it or not. Secondly, it provides more for you to present after the order is written. This also creates a sense that the price she is paying is lower than she expected compared to the value she is receiving.

6. Writing the Order

If you did a thorough job on the first five steps, you won't find yourself asking for the order; the customer will ask you to write it for her. As mentioned previously, you won't have to complete Step 5 (Presentation and Demonstration) because the customer wants you to write the order. If they visit your showroom first, it may be a preliminary order because you will most likely visit her home to complete the order details, potentially add to the order and receive a deposit. But, nonetheless, it's a relatively guaranteed order – to say the least.

Naturally, the customer may not ask you to write the order. If so, you will at some point have to ask the customer or just assume they would like to move forward. Generally, you should find a way to ask that is comfortable but also decisive. You might say "would you like to start this order by making a deposit with a credit card or check?" This will keep the customer involved in the selling process and determine whether you move to the next step, or return to Step 2.

When the customer makes it clear that she is unwilling or unable to give you the order at this time, then you must find out what needs to happen to move forward and be sure to follow up on any actions that are promised. It's a good idea to send a thank you note as well.

7. Reinforcing the Buying Decision

Once the customer commits to the purchase, it's extremely important to elevate her satisfaction by:

1. Completing the presentation of the product features and benefits
2. Reviewing the delivery and installation procedures
3. Reviewing the guarantee and warranty programs

Many times customers receive products and aren't aware of all the features and benefits at their disposal, or they're not shown how to utilize features properly. Then they become frustrated with their buying decision. Also, they may not fully understand the delivery or installation process (what and how long the process requires, what can go wrong and how things get resolved). For example, if an installation isn't completed on the first appointment, you may allow a customer to withhold some or all of the final payment until it's complete. Information not given in advance can generate dissatisfaction if the customer thinks one way and your policy dictates another. Finally, reviewing the guarantees and warranties that surround the purchase substantially increases the satisfaction levels of her buying decision because she will always feel better knowing that anyone at your company and the brand stand behind the purchase.

Phase III: Building a Valued Relationship

This is the phase that nearly every retailer can dramatically improve. It's the foundation for a growing and profitable business. In the retailer's mind the sale usually stops here (or worst yet at Step 6) – apart from the actual delivery. Once the sale is made, it's time to set the stage for the next sale with your customer. You do this by understanding a customer's future needs and maintaining contact with her after the installation. This builds an ongoing “valued” relationship and in many cases “friends” for life!

8. Future Needs

When customers make a purchase and feel really good about their decision, they're in the best frame of mind to disclose what they expect to buy next. It's a perfect opportunity to ask them about their future needs. It begins the process of “completing the sale” by increasing the chances they'll be a repeat customer and that you'll be able to maintain communication with them until they return. Remember, the sale is not complete unless the customer is willing to repeat!

This is one of the most important steps in building future business and customer loyalty. Additionally, it gives you an opportunity to uncover needs and information that could result in an add-on sale right then and there.

Note: if this occurs, you should begin from Step 2 and proceed through all the steps as if you are working on a completely new sale.

When this step is applied to selling custom window fashions, it's clear that you have an opportunity to sell if the customer is in the store by getting a commitment and then visiting the home for final measurements and color selection. During this in-home visit you begin at step 1 and continue through each step as if another sale is being consummated even though you're technically working on the same project.

9. Goodbye for Now

Sometimes saying goodbye can be awkward or abrupt. You certainly want to avoid both. You want to capitalize on this opportunity to make a lasting impression with your customer and say goodbye even though you just barely said “hello” to a relationship you intend to keep for a long time. Part of that

process is to create a sincere goodbye that may include walking the customer to the door or to her car if she is in the store visiting and giving her additional business cards that can be used for friends and family.

It's a good practice to shake hands and offer business cards while you request that she contact you directly with any questions or concerns she may have, so you can ensure she is completely satisfied doing business with your company.

When you visit the home, customers will generally walk you to the door and you'll say goodbye, thank them for the order (or the opportunity to provide a quote) and leave saying goodbye again and waving. Many customers find saying goodbye awkward and, therefore, it's best to find a way that allows you to control the situation in a pleasant and orderly manner. If a customer wants to assist you with sample books, it's generally a good idea to allow her to help to a limited degree. In any case you should delay saying goodbye until you have taken everything back to your vehicle, so you're not distracted from completing this step. When you leave the customer, it's a great time to get a "reading" on how the relationship is going. With that in mind, you should do several things:

- Review the next step and summarize what you will do for her that you may have promised during your visit together
- Thank her for her time and the order
- Remind her to call you with any concerns or questions
- Hand her two business cards
- Look directly at the customer when saying goodbye
- Be sincere and not eager to leave regardless of your situation
- Shake hands, matching the firmness of the customer, and make direct eye contact when you do so

Keep in mind that the last interaction is the first thing that's discussed or remembered when you leave — especially if a husband, friend or relative is part of the process. Saying goodbye professionally and with sincerity will prompt a very positive response from the customer. She might turn to her husband and say, "I really like her" or "She is very good." That's what stays with them and that's why it's so important.

10. When We Meet Again

When a customer makes a major purchase, sending a thank you note or even making a thank-you call may seem logical and perhaps expected. What most salespeople are unaware of is opportunity this creates to put the future needs of the customer provided in Step 8 into writing. Writing down what customers say they need in the future is a powerful reminder of what they want and another opportunity for them to remember that they are not completely satisfied without it. It tends to hold them accountable for their own desires and gives you permission to call them in the future to work on the next project. Finally, if done properly, it acknowledges your experience with them and begins the process of building a long-term valued relationship.

11. Following up after the sale

A call after the sale — but before the delivery — is an important reminder to customers that they are still important. Although it's suggested that the salesperson make this call, it's imperative that someone in your business call the customer. A simple message or conversation that updates the customer on the progress of the order is all that's needed to complete this step, but it's also an opportunity to capture additional customer information and add value to the relationship.

Talking personally with the customer offers the greatest opportunity to reinforce the sale and the relationship. You can guide the conversation in one or all of the following ways:

- You can rekindle the excitement of their purchase
- You can remind them about their future needs
- You can ask them if they thought about adding onto their order
- You can find out if someone they know is interested in your products

You don't need to go down this entire list in every case with every customer. Through your natural conversation with them, one or more of these discussion topics will occur.

12. Satisfaction Confirmation

Many customers may not consciously recognize or let you know if they feel “abandoned” by the salesperson once they’ve made their selection and committed to the purchase. This may be because in today’s retail environment it’s commonplace not to hear from salespeople after the sale. Once again, this is an important opportunity for you to differentiate yourself from nearly everyone else.

It’s absolutely imperative that you call and/or visit customers after the sale to ensure that they are thoroughly satisfied with their purchase and:

- You can remind them about features and benefits
- You can offer them your services in the future
- You can remind them to call you directly if they have any questions or concerns

More importantly, let the customer know that you will be contacting her in the future about additional business. When you periodically *remind* customers about your business, you’ll get more business from them and/or someone they know. That’s why it’s imperative that you implement a comprehensive consumer database system (like the Internet Customer Management system - iCM) that gives you the flexibility to manage your customer information at your store and market effectively to new and previous customers.



*Remind your customers
about your business.*

The 12 Steps to Building Your Business



Relating to the Customer

Throughout the entire interaction with your customer it's essential that you open up to the customer and draw out her personality and character. The best way to do this is to relate to the customer in an appropriate manner. Providing sincere and timely compliments about her or relating your own experiences is all part of getting to know your customer and building a valued relationship. It's vital that she see the "human" side of you since it tends to make her feel relaxed and comfortable.

Customers also want to feel understood, which means that you have to develop good listening skills and you have to let customers finish their thoughts without interruption. One of the most common forms of interruption is the phone or another customer wanting your attention. You should always allow customers to complete their thoughts or you should complete yours before asking for permission to tend to another situation while you're assisting them. Turn off your cell phone, make sure that someone else is answering the store phone or accepting deliveries or any other thing that you can think of that causes conflicts with your attention to the customer.

Think of how you feel when you're trying to get information about products or services and the salesperson answers the phone and begins assisting another customer. Doesn't it make you feel awkward and sometimes outright angry? During that interruption, customers will "judge" you and what you're selling, and more often than not, begin to feel doubts about the purchase. Also, it's very difficult to pick up the momentum once you are distracted. The situation can go downhill rapidly, especially if you return to the customer and say, "Okay, where were we?" The customer will usually say she needs to think about things and make an excuse to leave. You've done that, haven't you?

You must stay focused as best you can and provide customers your undivided attention as much as possible from the moment you meet them until they drive away!

Training

I can assure you that this process (like any other selling process) can and will be disrupted by some customers at various steps along the way. It's not easy to "get to know your customers" when they seem hurried or act like they know what they want. This can be discouraging to you while you're learning and practicing these steps in the PCMP. Most salespeople overcome this problem and find a way to get customers back on track. Sometimes you must work with a customer in her way before you can gain her confidence, then return to the steps that will enable you to be successful in achieving maximum customer satisfaction.

It may seem "natural" to train salespeople in the order of the 12 Steps, but the natural thing to do is to ensure salespeople are trained thoroughly about your products and services first before considering these steps... especially if salespeople are new to the business. Doing this first will make all the steps easier — particularly the most critical Steps 2 and 3.

For existing sales staff, learning a new method and system will also be challenging. Although they may know the products, they may feel they also know how to sell. That's not what this system is intended to teach. It helps salespeople learn how to satisfy customers and bring them back again and again — and not to "sell" customers something. It is not about making a sale. It is about making a customer.

Training is an ongoing function in a business. The more organized and structured it is, the better the results. The PCMP is designed to improve results, making employees more productive and helping them earn more money, but most importantly, thoroughly satisfying more of your customers. The program incorporates a complete training plan for new hires that can span twelve weeks and allows you to customize a weekly plan based on events and opportunities that impact the schedule. For example, if an installation for five Duette® with UltraGlide® TD/BU shades is scheduled during the fourth week, you should send the employee on this installation and easily reorganize the agenda to fit this opportunity. Or if your supplier is offering a seminar you want the employee to attend on a specific day, you can change the agenda to accommodate this event.

The PCMP offers you a flexible training program to make the employee's experience highly beneficial and arms them with great customer management skills.

Training is about making a customer, not about making a sale.

What's Next?

The decision to put this new system to work requires more than just saying, "I want to do it." It's not an easy task to change the way you do things and ask your staff to change the way they do things. Change creates fear and can cause resistance, so you must get buy-in from your staff to make this work. More importantly, you must review your systems or adopt the ones we've developed to support this system. Your results will be awesome if you follow the training program and work the system, so it's important to us that you are prepared to take it seriously.

Managing the customer's experience is the goal, so you'll need to review your entire system. It starts with what the customer sees or hears about you (advertising & publicity) and continues for as long as the customer remains in your market area.

Use the following tools and training to better the customer's experience:

- My Brand Builder
- Consumer Store Audit (Mystery Shop)
- Answering Service
- No Interest Financing
- Hiring and New Employee Training Guide
- Product Training Tools
- Training Your Staff
- Internet Customer Management (ICM)
- On Line PCMP Selling Course
- Certified Professional Installer Training
- Customer Service Training

Call 877-407-3300 to learn more about any of these Hunter Douglas Alliance programs and services.

Conclusion

In a chaotic, fragmented, narrow-minded, price-driven, manufacturing-based and basically "brandless" industry, consumers have little or no loyalty, knowledge or sense of value for the products and services that are offered. They are clamoring for guidance, order and an understanding of what is available, where to get it, how to value it and the peace of mind knowing that it is worth the price.

You're fortunate to be able to touch your customers more times than nearly any other type of retailer. Customers don't just come in to pick up a toaster, pay for it and leave. You can get deeply involved in their shopping experience, visit their home, and understand their real desires and bond with them. But with this good fortune comes the increased risk that something can go wrong along the way. Perfecting this unique customer relationship is going to help you be smart retailers – very smart retailers. Together, we're going to do things our competing channels cannot do. And anything that they can do, we're going to do better.

Start by asking yourself these questions:

- Would I buy from me?
- Would I tell others to do the same?
- Does my staff care enough to make a difference?

Essentially, you want to know that customers are comfortable with your business. Figure out what's important to your customers and really pay attention to them.

Consider these three areas to strengthen your business:

1. Meet or exceed customer expectations before, during and after the sale
2. Stay in contact with and nurture your customers – this is your greatest untapped resource for sales
3. Capture relevant customer information to develop a comprehensive consumer database system

We all must find inspiration everyday to give our customers a better experience with us than any one of our competitors. Your inspiration will come from a simple but sincere thank you from a customer for a job well done to the ultimate

act of customer satisfaction — a repeat order or referral. Or it will come from a cooperative effort to process and install an order in record time to meet a deadline for an important consumer event such as an open house or wedding.

Making your business work to accommodate your customer's needs with maximum impact is the key to your future success and domination of your marketing area. Now is the time to make the commitment to start the change and build an incredible business for yourself, your team and, most importantly, your customers.

Right here, right now...

List 5 things you want to change or improve in your business:

1. _____

2. _____

3. _____

4. _____

5. _____

**“Elevate your business
beyond your wildest dreams!”**

“Making your business work to accommodate your customer's needs with maximum impact is the key to your future success and domination of your market area. Now's the time to make the commitment to start the change and build an incredible business for yourself, your team and, most importantly, your customers.”

HunterDouglas

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