

World Class Installation System

by Jim Armstrong
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“Crush the Competition”

Important Notices

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Introduction

A message to the store owner

“Whatever you do, do it so well and so uniquely that people can’t help but talk about you.”

-Walt Disney

“Wow your client.”

“Perception is everything.”

The World Class Installation Process is based on written systems. It’s a relatively simple system, but it is utterly dependent upon strict rules of engagement (ROE’s). ROE’s insure that tasks are done consistently, day in and day out, therefore insuring that clients consistently enjoy a quality experience with your store, and you and your staff enjoy a consistently stress-free work environment.

Don’t mistake simplicity for ineffective. This system is powerful and—if followed faithfully and built upon—will make your sales, service and installation process run like a well-oiled machine.

It would be impossible to craft a system that would exactly match every individual dealer who becomes an Inner Circle Member with *Jim Armstrong Marketing Systems*. Therefore the World Class System is designed to do three important jobs:

1. Provide flexibility to fit ANY store. You might own a small mom and pop shop with only 2 employees, or you might own multiple stores with dozens of employees and multiple installation crews. Simply tailor the steps and the spreadsheet to match your unique situation.
2. Teach you the principles of systems. Even though there is huge variety in the size and methods of each store, the principles of any successful system remain the same regardless of where they are applied.
3. Teach you the skills to create “Micro Systems” within your business.

Micro Systems: There are literally dozens of day-to-day tasks that are repeated by you and your staff. By knowing the principles of systems, you can create a “micro system” for any task regularly done in your office. For example; a system for opening the store; for closing the store, processing accounts payable; processing accounts receivable, etc., etc., etc. **Remember: if it’s not written down, it’s not a system.** Each time you find yourself or your staff repeating a task, write the steps down following the principles you are learning in my World Class Installation System.

“Work on your business, not in your business.”

Creating systems for every task insures that the task is done consistently and reliably, and most importantly gives you the freedom to think about more important things other than if a task is being done properly. It gives you the freedom to work on your business (develop marketing, spend time thinking strategically) rather than in your business (putting out fires, doing tasks that could be delegated, etc.).

Delegation and training is far, far easier when you have written systems. It also makes it easier to expand or sell your business.

Delegating tasks & responsibilities—handing out hats

This manual is based on a 5-person staff:

PC Project Coordinator
MC Marketing Coordinator
SP Salesperson
IN Installer
WH Warehouse staff

My system delegates all tasks and responsibilities to these five staff members.

Stores have varying numbers of staff members. If you have fewer staff, it simply means that each staff member will be responsible for more tasks; they’ll wear multiple hats. If you have more staff members, each member will be assigned fewer tasks. Assign tasks according to the number of employees.

For example, if you may not have a full-time Marketing Coordinator. You might decide that your Project Coordinator will wear that hat. If so, just make sure the PC understands that he/she will be wearing that hat and performing those tasks, and is trained accordingly. By doing it this way, when your business grows to a point that you hire a full-time Marketing Coordinator it will be much easier for the PC to train the new person and hand off that hat.

Customizing this manual

This manual is written so that you can simply plug in **YOUR STORE** name and change other **HIGHLIGHTED** areas and use it as is. Or you can make modifications based on the systems you already have in place.

(NOTE: before printing the manual or any other marketing pieces, eliminate the highlights. I have had coaching clients leave them in because they thought the highlights were part of the marketing piece.)

A word of caution when making modifications: DO NOT violate the principles of business systems. Remember the goal of systems: to increase your income AND provide walk away power for you. If you are used to “baby-sitting” your store, breaking free of the baby-sitter mentality will require fundamental changes in your attitude.

How many times have you said or thought, “**If you want it done right, you’ve got to do it yourself**”? Most small business owners have, and it’s a toxic philosophy that will keep you chained up as a slave to your store. If you want freedom you MUST delegate. Even if your store is small with just you and your spouse running it, you must put systems in place in anticipation of delegating.

Systems give you the power to delegate and STILL provide World-Class client service to your clients. In fact, done properly, systems and delegation will allow you to provide even better service because you won’t be stretched so thin. By not wearing so many hats you’ll be able to focus on a few key tasks in your business and to perform these tasks with excellence.

Therefore, as you make modifications, guard against modifications that keep you in the role of baby-sitter. In fact, before making modifications, study this entire manual in its entirety so that you thoroughly understand the principles, and read the book “The E-Myth” by Michael Gerber.

The Big Picture

In this manual I have put descriptions of the sales system, the installation system, and other systems. I have done so in order that the Project Coordinator will see how his/her role fits into the big picture. At the end of the manual I included printouts of all the forms used during the World Class Installation Process. I recommend that you make copies of this manual for every staff member and installer so everyone on your team knows the Big Picture. Make copies of the other marketing pieces used during the process (Reticular Activator campaign, Shock-and-Awe campaign, etc.) so your team will gain an even deeper understanding of the Big Picture. The more familiar EVERY Team member is with your marketing and mindset, the more effective everyone will become. (All marketing letters, forms, etc., are on your CD ROM.)

The descriptions of sales and installation in this manual don’t involve the technical, nuts-and-bolts specifics on how a carpet installation is done, or sales information on your particular products. You should already know these things as a store owner. What I focus on is providing you with unique, outside-the-box, strategies to “WOW” clients with World Class Service during the sale and installation, thus resulting in increased sales and referrals.

A Few Words About Contact Management Software

This is not a training system for how to use computer software. However, I realize that computers are a powerful and necessary tool for effective marketing. Therefore, throughout my materials, I will occasionally reference the contact management software I currently use: ACT. This is not an endorsement or even a recommendation that you use ACT. I mention it to give you examples of the jobs your contact management software should be able to perform.

I know the tasks that any marketing/contact management software needs to perform. However, I am not an expert in programming, computer networks, or any of the other nuts-and-bolts technical know-how possessed by trained computer experts. In other words I know WHAT my software needs to do, but I rely on computer experts to show me HOW to do it.

My approach to marketing/contact management software has always been to decide ahead of time what I need it to do, then talk to my computer consultants and get their input on the kind of software I need to make it happen.

I happen to like and use ACT and it meets my needs. However, before rushing out and buying ACT (or any other software program) I recommend that you determine ahead of time what your exact needs are, then consult with a computer expert. As you read through my materials, you will get a clear idea of the jobs required by your software program.

My purpose for mentioning the functions of ACT and what it can do is not to sell you on ACT. It's to show you what any system you currently have (or decide to purchase) should be able to do.

If after researching all your options you decide to use ACT, www.BullFrogSolutions.com provides excellent training, support and customization.

Paper-tracking vs. database tracking

Unfortunately there are so many contact-management software programs available—from generic programs like Outlook and ACT to programs specific to the flooring industry—it's simply beyond the scope of this manual to provide instructions on using any particular database to implement the World Class Installation System.

Therefore, the World Class Installation System as laid out in this manual is based on having two things in place:

1. **Using contact management software to market to prospects and clients.** If all you can do is print name and address labels, you can make the marketing portion of the World Class Installation System work.

2. Using paper Task Tracking sheets to track all the steps in the World Class Installation System.

If you're a small, mom-n-pop store, this bare-bones (mostly paper) system will work fine until you grow and are able to invest in more sophisticated contact-management software and training. If you own a larger business—and/or have the financial resources—the steps in the World Class Installation System can be totally computerized.

One reason I like ACT is it allows you to look at all the tasks for all the clients that need to be done on a given day. You don't have to physically examine the file. For example, if on Monday, July 1st you need to order product for Mrs. Smith, schedule an installation for Mr. Jones, and follow up with the distributor supplying carpet for Mrs. Duck, you can look at a single screen in ACT and it shows you all of this. It allows you to work off of a checklist. ACT is also very easy to customize.

The important things to remember are the principles of business Systems. How you implement them—whether on paper or with a computer—is up to you.

Updating This Manual

Progress, not perfection

If it's not written down, it's not a system

This manual is the SYSTEM for providing outstanding client service, and for creating a stress-free work environment, and for creating “Walk Away Power.” As the **YOUR STORE** team strives to provide better client service, and as our business grows, it will be necessary to continuously update this manual to reflect those changes to the systems. Always avoid “unwritten” guidelines in the **YOUR STORE** system. Remember: if it's not written down, it's not a system.

Therefore, it's critical that you have a SYSTEM for changing the system. Here is how this will work:

1. Write any changes, clarifications, suggestions, or additions on the blank, left-hand page.
2. Book-mark this page with a sticky-note.
3. Discuss at weekly staff meeting.
4. Type changes into the manual after the meeting and save. (When appropriate, make changes to “Task Tracking” sheet in Excel.)

NOTE: Use this same process for updating ANY system in your business.

Terms

SP	Salesperson
PC	Project Coordinator
IN	Installer
WH	Warehouse staff
MC	Marketing Coordinator
ROE	Rules Of Engagement
ETA	Estimated Time of Arrival

Guiding Philosophies

Principles of World Class Service

Principles are bedrock beliefs—core values—that provide the foundation for how we conduct ourselves personally and in business. The mindset of the **YOUR STORE** team is formed by these seven Principles of World Class Service. Without core values, the World Class Service strategies remain mere gimmicks—they won't be the relationship-building tools that transform the way we do business, and people won't refer others to our store.

1. Learning: Progress, not perfection.

Learning is a lifelong journey because school is never out for the professional. Therefore at **YOUR STORE** we engage in constant learning as we improve our skills and our systems. We look for progress, not perfection in ourselves and others.

2. Character: Character is an “inside job.” We must change on the inside before it affects our actions on the outside.

Character makes it possible to have a good life and business. We are willing to do whatever is necessary to make our actions match up with our intentions.

3. Policy: core values dictate policy

These three-questions guide us in all policy decisions:

- From the client's point of view, have we treated him/her with complete respect?
- From the client's point of view, have we surpassed his/her expectations?
- From **YOUR STORE**'s point of view, is it in our best long-term financial interest?

4. Commitment: we are our client's “Flooring Consultants For Life.”

People are looking for counsel from a trusted advisor, not to be pressured by a salesman. Therefore we conduct ourselves as trusted advisors for life—much like a family doctor or CPA—rather than as a salesperson for that single sale.

5. Relationships: relationships are built on trust.

As **YOUR STORE** consultants we communicate sincere caring for our clients. We are willing to put aside our personal agenda for theirs. In doing so, we are able to meet their current needs as well as match their future goals with the right flooring today. (Being aware/concerned about our client's immediate needs and future goals is a critical aspect of what we do differently here at **YOUR STORE**)

6. Values: quality decisions are based on core values.

Making quality decisions is possible when we are clear on our core values. As **YOUR STORE** consultants, we understand our values, and make decisions that are guided accordingly, thus earning our client's trust and respect.

7. Trust: we earn our client's trust through truthfulness.

As trusted advisors, we are truthful with clients even when it would be easier not to be. To earn our client's trust, we volunteer information, personal experiences, and by relating to the unique goals and desires of our clients.

Guiding Philosophy: Lifetime value of a client

Relationship oriented vs. transaction oriented

Most businesses and employees are transaction oriented. They only consider the value of a client during that single transaction. At **YOUR STORE** we are relationship oriented and we understand the lifetime value of a client.

Lifetime value is what a client is worth to **YOUR STORE** over the course of our relationship with that client, and we base all our decisions on this philosophy. This represents a small but powerful shift in thinking. Here's why:

YOUR STORE's average gross revenue per transaction is **\$5,000**. Most companies will see a client as worth **\$5,000**. Here is how **YOUR STORE** views the value of a client over 7 years.

Initial transaction:	\$5,000
Referral during that transaction:	\$5,000
Second referral during the interim 7 years	\$5,000

Second transaction (people replace flooring every 7 years on average)	\$5,000
Second referral during that transaction:	\$5,000

Lifetime Value	\$25,000
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And that doesn't even include the referrals that the referrals generate. If we include those, the true lifetime value could be as high as \$50,000 to \$80,000. Therefore, each and every client that walks through our door is worth anywhere from \$25,000 to \$80,000.

At **YOUR STORE**, we treat every client like they are worth \$25,000 to \$80,000, because in reality they are.

Guiding Philosophy: All client interactions will be approached with the repeat/referral mindset.

The lifetime value of a client is ten to twenty times the value of the initial transaction. Therefore,

we approach every client interaction with this in mind. How we interact with our client determines the lifetime value. If we neglect them, don't return a phone call, don't keep them updated, etc., we may still get the initial sale, but destroy lifetime value in the process. Therefore ALL client interactions will be approached with the repeat/referral mindset.

Guiding Philosophy: Begin with the end in mind

The actions we take today affect the results we get tomorrow. Therefore every action is done with the end goal in mind. We begin by building foundations that will enable us to achieve our end goal. Here are some examples:

- Client interaction: begin the relationship with the repeat/referral end in mind.
- Personal goals: begin with specific actions today that will enable you to reach your end goal.
- Sales goals: begin with actions today that will enable you to reach your end sales goal.
- Implementing policy: begin with policies today that will help our company reach the goals we have set for tomorrow.

Guiding Philosophy: Use your mind for processing, not for storage.

When we try to remember or store tasks in our mind, that's when mistakes happen. Therefore, we rely on written systems and calendars to perform tasks in a consistent, reliable manner. Also all tasks—present or future—will be entered into our calendar. We do not use post-it notes or notepads as reminders. We do not rely on our memory to remind us. By using Systems and calendars we leave nothing to chance, thus enabling us to consistently deliver on our promise to provide a World Class Installation Process to our clients.

Guiding Philosophy: Progress, not perfection

We will never be perfect, so “fuggettabbouddit!” However, we can constantly improve. Small daily and weekly improvements will add up over time, making **YOUR STORE** more profitable and of much better service to our clients—and a much better place to enjoy your career!

A very important part of your job as PC is to take note of “rough spots” in the installation system and write them down, as well as any ideas for improving them. We also want creative input for improving any other areas in **YOUR STORE**. During team meetings we will implement changes to improve these areas.

Guiding Philosophy: you are the pilot of the plane.

Buying flooring is like taking an airline flight across the country. The client has a goal to reach their destination (beautiful new flooring of their dreams) and it's our job to get them there. As the pilot, you are responsible for all aspects of the flight—even things that are not your job. For example, it's not your job to ship the product; that's the manufacturer's job. Your job is to make sure that you submit a complete and thorough order to the manufacturer so that their staff can quickly understand what we are asking from them. (“Garbage in, garbage out” theory.) And then to follow up with them to make sure the product is processed and shipped in a timely manner. If the shipment is late, we can't go to our client and say, “Hey, sorry you're not going to get that flooring on time for your daughter's wedding reception at your house...even though we ordered six weeks ago. It's the manufacturer's fault because they lost your order and didn't ship it!” The client doesn't care what the manufacturer did or didn't do. They will hold us responsible—and rightly so! They hired US to be the pilot, not the manufacturer.

So what does that mean for you? It means that all the other parties involved in the sales and installation take their cue from you. This includes:

- Outside players (suppliers, shipping companies, manufacturers, insurance companies, Realtors, etc.)
- And inside players (warehouse staff, installers, sales people, etc.)

You are directing the show. You are piloting the plane.

This does not mean you are belligerent. You always act in a professional and courteous manner. It means that you don't allow other parties to grab the controls—not even the client. Grabbing the controls can mean:

- Blowing deadlines
- Losing documents
- Making mistakes and not correcting them promptly
- Anything that causes problems or delays with the sales and installation.

There are anywhere from 20-30 people involved in getting new flooring, and these people can cause a lot of turbulence. And just like real airline pilots we can't promise our clients we will never hit turbulence, but as the pilot of their plane we do promise them that if we hit turbulence we won't bail out on them. We will use our professional skills to pilot them safely through the turbulence and on to their destination. (The "Turbulence Letter" we send out to all our clients' talks about this.)

Guiding Philosophy: Always assume the other party is going to drop the ball.

Others will drop the ball, and it's up to us to remind them to pick it up. **YOUR STORE** deals with hundreds of professionals. Some are reliable, many are not, and over time you will learn which is which. During the installation process, **YOUR STORE** will interact with 20-30 other people who are directly involved with completing that particular transaction. These 20-30 people can cause a lot of turbulence during the process. ALWAYS assume that the other party will lose, ignore, misplace, delay, or otherwise not fulfill your request. This doesn't always happen—about two-thirds of the time they will fulfill your request. That means that at least one-third of the time the other party will not do their job. Think about that: *at least 30% of your requests are not going to be fulfilled the first time you ask.* This means huge delays with the installation, losing sales, losing clients—and ultimately losing thousands of dollars in revenue for **YOUR STORE!**

We cannot allow the unprofessional conduct of others in our industry to negatively impact **YOUR STORE**. Later, you will learn practical steps to make this philosophy a reality during the installation process.

Systems

Guiding Philosophy: If it's not written down, it's not a system.

Guiding Philosophy: Systemize the rule, humanize the exception.

You will be trained to follow a written system from beginning to the end of the installation process. Every step in that system will be logged, as well as every incoming and outgoing communication relating to each client. All stages of the process will be instantly available for review by any team member.

If a situation occurs that doesn't fit within our system, you will be trained to diplomatically handle the situation with the client or strategic alliance partner, or bring the situation to the store owner, manager, sales person or other appropriate staff member as necessary.

As the PC we are counting on you to excel in your area. After you have thoroughly mastered the system, we want your ongoing input on ways to improve. Remember: progress—not perfection.

Project Coordinator Job Description

Installation Process definition: all activities that take place from the time a client walks in through the door, the sale is made, installation, and follow up.

Your job is to coordinate all tasks in the installation process, even tasks that you do not personally perform.

Examples:

- After the sale is made and it's time to order product, you make the order.
- After the product arrives and has passed quality inspection, you coordinate the installation between the installer and the client.
- After the installation and it's time for the salesperson to make the follow up call, you schedule the salesperson with an "activity" to make the call.

In other words, you are the pilot of the plane.

NOTE: This kind of task-delegation is much easier if everyone is using a networked calendar. ACT has this ability. In the example above, the PC simply schedules the salesperson with an activity to give the client a follow-up call.

Your most important job as PC is to make three critically important things happen:

- 1. Repeat business.** Give clients a "Wow" experience so they come back.
- 2. Referral business.** Actively seek referrals and give clients a "Wow" experience so they refer others.
- 3. Peace of mind for the other team members.**

Word of mouth advertising is the best form of marketing. Period. Here are several benefits from getting clients through referrals:

- You will be financially rewarded for each referral you generate during the installation process
- We get clients for FREE! Cold marketing is incredibly expensive, so instead of exhausting our resources in newspaper ads, radio, and television, we would rather put the bulk of our time, energy and money into generating repeat and referral business.
- Prospects are pre-sold! The person referring us has just told their friend or relative how utterly wonderful our company is. They have very little skepticism and are generally ready to move forward.
- We get the halo effect. Other people saying **YOUR STORE** is great is 10 times better than us saying it. It gives us a halo of credibility.
- Very low skepticism! After all, if Aunt Liz likes and uses **YOUR STORE**, it must be pretty good!
- Eliminates "price shopping."

Don't miss the significance of these benefits. With a referral or repeat client we are being handed a pre-sold, non-skeptical client who sees us with a halo and who is unlikely to "price shop"...all with no marketing costs!

This is so powerful that we don't just wait passively for repeat and referral business to happen. We have the tools in place to actively seek repeat and referral business. **You will also be financially rewarded for every referral you generate during the installation process!**

You might have noticed that up till now not one word has been said about how to process an installation. This is because doing an excellent job processing is merely a tool to facilitate the three most important things:

1. Repeat business
2. Referral business
3. Peace of mind for the other team members

This doesn't mean that processing installations, or fielding phone calls, or any other task you undertake each day is not important. Far from it! What it means is that we want you to approach each task with the repeat/referral business mindset. Perform each and every task with such a high level of excellence that clients are EAGER to come back and refer others.

Project Coordinator

Mission/Purpose of the Job: The mission is to order and track products, schedule installations, communicate with clients and staff so as to insure smooth, on-time installations. In addition, these results must be produced in such a way that our clients have a "wow experience" so unique that they can't help but talk about **YOUR STORE**, and are powerfully motivated to refer those in their sphere of influence. In addition, the PC is to maintain and help build the relationships with other stakeholders such as sub-contractors, suppliers, insurance companies, manufacturers, distributors, shipping companies, and strategic alliance partners.

Objective

To create freedom for the all other Team members to spend 100% of their time marketing, performing administrative functions, installing, meeting one-on-one with clients, and other tasks specific to their job: not processing installations. All other tasks are to be handled by the PC in such a way that 'wows' our clients and makes them want to refer others, and creates peace of mind for the sales people, owner and other team members..

Results vs. Activities

At **YOUR STORE** we distinguish between an activity and a result. We want results, not activities.

For example, we do not want someone to process installations. Processing installations is an activity. We want you as the PC to allow the sales people, warehouse staff, administration staff, and store owner the freedom to make the highest and best use of their time such as marketing, meeting one-on-one with clients, and other tasks specific to their job: not processing installations.

Therefore, the result we want is peace of mind for the team, freedom for the other team members to spend 100% of their time fulfilling their job duties, and to provide our clients with a World Class level of service that makes them want to use us again and refer others to us.

Empowering leaders vs. hiring helpers

If we hire a helper, that is what we will get: someone who helps us do things. Someone who performs activities rather than achieves results.

At **YOUR STORE** we want to attract and hire leaders: people with the skills, initiative and quality of character who will help take **YOUR STORE** to the next level.

Therefore, you as a team member will be made stakeholder in the fortunes of **YOUR STORE**. If **YOUR STORE** does well, you will do well. We want to empower you to take personal pride in your position in the company, and give you additional incentive to pursue ever higher levels of excellence within your field.

You will be paid on a base salary, with a commission scale tied to the number of closed transactions each month.

Using the installation process as a marketing tool

The installation process takes 30-60 days, and during this time (more than any other) the client is most available to refer others. This is due, in large part, to the **Reticular Activator**. This simply means that while purchasing flooring, clients are more likely to notice others within their circle of influence who are also thinking of buying flooring. It will come up in conversations. It's the same when you buy a car or a new pair of shoes. Suddenly you notice everyone else with the same car or shoes, and people talking about buying cars or shoes.

At **YOUR STORE** we realize that during the installation process (rather than after) clients are at their "hottest." We take advantage of the Reticular Activator, and approach the entire installation process as a marketing tool with the sole purpose to "wow" clients and proactively generate referrals.

Therefore, you will be trained to have this same mindset, and made a stakeholder in the game so you will enjoy financial bonuses for each referral you generate during the process.

Tools used during the process to create a "wow" experience and generate referrals:

- Touch point letters—fun and informative letters sent throughout the installation process to educate and “wow” clients and remind them to refer. (The lotto letter, the turbulence letter, etc.)
- Weekly updates—using e-mail, voice mail, or personal phone calls, the PC will keep the client updated during every step of the process.
- Newsletters
- Outstanding phone skills
- Asking for referrals at key opportunities

PC Training

There are two distinct kinds of training you will receive, and both of them are critical to your success at **YOUR STORE**.

1. Job Training. You will be thoroughly trained in the system of processing installations, fielding phone calls, using the software, etc. You will be given the tools to achieve excellence in your field.

2. Core Values Training. Through audio CD’s, you will also receive ongoing training regarding the core values of **YOUR STORE**, including:

- Positioning ourselves as trusted consultants vs. salespeople
- Lifetime Value of a Client
- The compass (From the client’s perspective have we treated the client with respect, etc.)
- Creating a “wow” experience
- Asking for referrals
- Using the phone as a marketing tool (not telemarketing)
- The repeat/referral mindset

NOTE: Through your Inner Circle Membership, you will receive monthly audio CD’s, many of which will provide excellent mindset training for your staff. As an Inner Circle member, you have my permission to copy these CD’s to distribute to your staff for training purposes **ONLY**.

To begin building your audio CD library right now, go to Nightingale.com. I recommend anything by Joe Polish, Brian Tracy and Michael Gerber. This should give you a good start as you begin building your training & motivational library.

Rules Of Engagement

Rules of engagement (ROE's) insure that you as the PC are able to complete every step in the system consistently. This reduces stress for all staff members, and enables us to fulfill the promise of World Class Service that we make to our clients.

Later on you will see an example of using ROE's in the World Class Installation Process.

NOTE: Bullfrog Solutions provides excellent training for using ACT to implement ROE's.

ROE: Activities are either timeless or scheduled

Timeless activities are items that need to be done on a certain day, but not at a specific time. Basically a "to-do" list. For example, ordering product, scheduling an installation, verifying that a shipment has arrived at your warehouse. These can be done at any time during the day.

Scheduled activities are items that have to be done at an exact time. For example, a meeting with an installer, a phone appointment with a client during their lunch break, etc.

ROE: There are 3 kinds of activities: calls, meetings and to-do's.

There are three kinds of activities that go into your calendar:

1. Call—phone calls. Can be either timeless or scheduled.
2. Meetings—always scheduled.
3. To-do's—any activity other than a phone call or meeting. (For example, updating the master orders board, sending an email, faxing in a product order.) To-do's can be timeless or scheduled.

ROE: Calendaring—always operate off a checklist

Your calendar is the core of the World Class Installation System.

(NOTE: If you are using a paper calendar, I recommend a day-at-a-glance because it gives you far more space to write. However, I can't recommend strongly enough to use a computer for all calendaring, even if it's generic like ACT. It will save you a lot of time, energy and frustration. Also, a calendar that has network capabilities makes it far easier for the PC to assign activities to the various team members. ACT can be networked.)

Always operate off a daily checklist. NEVER depend on your memory! A calendar allows you to do this. As items come up during the day that need to be done, immediately enter them in your calendar, even if you plan to do it in five minutes. Activities that go in your calendar are either "timeless" or "scheduled."

If you are just beginning to use this system, follow these steps to get your calendar started:

1. Complete task tracking sheets and folders for every client now “in process.” Mark down all the activities that have already been completed.
2. In your calendar, enter the next activity from the task tracking sheet that needs to be done. Each entry should indicate which client the activity is for. (For example, if you have completed the “Order Product” activity on the Task Tracking sheet, the next step on the Task Tracking is “Product Received,” enter the ETA into your calendar.)
3. You should now be able to go through your calendar and see all the next steps that need to be done for each client.
4. As each activity is completed, enter the NEXT activity from the task tracking sheet into the calendar.
5. EVERY activity gets entered into your calendar. As activities come up that aren’t listed on the Task Tracking sheet, it’s even more important that these are entered. This means any phone call, meeting, or to-do is entered, no matter how trivial. For example, if the sales manager asks you to notify her when the Jones’ installation is scheduled, put an activity in your calendar to notify the sales manager on the same day you have the “Installation Scheduled” activity entered.

Following these steps will enable you to work off of a daily checklist. You’ll be able to look at your calendar and “see” everything that needs to be done that day laid out for you.

NOTE: ACT makes this kind of calendaring very easy.

ROE—Communications—record every incoming and outgoing communication regarding a vendor or client

The SUPREME RULE of communications:

EVERY incoming or outgoing communication (phone, fax, or email) regarding anyone in our database is to be recorded (Either on the left hand side of the paper file, or the conversation log in your contact management database. Again, ACT makes keeping these kinds of records, and assigning each record to an individual client or vendor extremely easy.). This is critical for several reasons:

1. We have an instant record of all communications. We never have to wonder, “Gee, did I follow up with the manufacturer and confirm the order went out?” or “Did I call the client back to schedule that seam repair?” It’s all right there.
2. It’s professional.
3. It helps to provide “World Class Service” for our clients.
4. It protects **YOUR STORE**. Occasionally a transaction will start to encounter problems, and in those instances sometimes accusations about “who is at fault” will start to fly. A detailed notes and histories allows us to demonstrate that **YOUR STORE** did not drop the ball. Or, if we did, we can see exactly where it happened and take concrete steps to make sure it doesn’t happen again.

NOTE: ACT makes this process very easy.

ROE—Always assume the other party will drop the ball

We cannot allow the unprofessional conduct of others in our industry to negatively impact **YOUR STORE**, or jeopardize our ability to provide World Class Service to our clients. Therefore we verify that all product requests were received; we obtain ETA's for everything; and we never leave any doubt that the other party understands what we need and will deliver on time. It also means we obtain concrete commitments from the other party regarding delivery times, ability to provide certain products, pricing, etc.

ROE—Always obtain concrete commitments from the other party

Never accept “maybe,” “probably,” or “possibly” as answers to your questions.

For example, if you ask a distributor if he can provide a certain style of laminate flooring by next Tuesday, and he answers, “Maybe, if we have it in stock,” don't accept that answer. Make him find out if it's in stock, verify the shipping time, and give you a commitment.

Any time you get an answer that leaves you unsure about anything, make the other party get the answers and commit. (Remember to log these commitments into your conversation log so you can hold the person accountable.)

Something magical begins to happen when we do this: all the suppliers we deal with regularly will realize that this is how **YOUR STORE** does business, and they will respect it. They will realize that we won't accept vague answers to our questions, and eventually they'll stop trying to give us vague answers. They will come to respect our way of doing business (perhaps grudgingly), but they will respect it and fall in line.

ROE—Obtain ETA's for ALL requested items

ROE—Verify ALL deliveries 3 days before ETA

This includes physical items (products, fax, package, etc.) and non-physical (a return call, confirmation of a product order, email). Schedule a follow up for the day of the ETA.

Example:

Let's say you order cushion from the distributor on 7/1. While you are on the phone, obtain the ETA for arrival of the product. **DO NOT** finish the “activity” of ordering without getting the ETA for arrival. If they give you an arrival date of 7/6, mark this on your task tracking sheet, and enter a “to-do” in your calendar for 7/6 as “Product Received”.

But don't stop there: three days before the ETA (on 7/3) enter an ETA FOLLOW UP in your calendar. On 7/3 you look on your calendar and see the ETA FOLLOW UP, so you call the distributor and verify that there will be no delays for the 7/6 ETA.

On 7/6 you look on your calendar and see that the ETA for the cushion is today. You follow up with your warehouse staff to verify that it arrived. If it has arrived, indicate it

on your task tracking sheet, and clear the activity from your calendar. If it hasn't arrived, contact the distributor and get a new ETA. Let's say the new ETA is 7/12. Indicate the new ETA on your task tracking sheet and enter a to-do into your calendar on 7/12 as "Product In." Record the conversation with the distributor in your conversation log on. Repeat these steps until the product arrives. If this causes a delay for the installation, notify the client immediately.

NOTE: ACT makes this process very painless.

ROE—Track all orders and back orders.

There can be up to three parties involved in all orders and back orders:

1. The manufacturer
2. The Distributor
3. The Carrier

That's a lot of potential "ball dropping" that can happen.

Therefore, after an order is placed and we verify and record the ETA, we begin tracking the delivery until it arrives at our warehouse. Every three days after a product is ordered, we email whichever party is supposed to have the product at that time—manufacturer, distributor, or carrier—and verify that delivery is going to happen on time. If you don't get a reply email, or we are within 3 days of the ETA date, make a phone call.

Also, by tracking the delivery from the day it's ordered, you eliminate a lot of stress for everyone. For example, let's say you order carpeting and the ETA is two weeks away. If there is a delay on day 7, you still have 7 more days to either make sure the carpet will arrive on time, or if it looks like it won't, give the client PLENTY of notice.

NOTE: Tracking orders and back orders is critical. If you leave it up to the manufacturer, distributor, or carrier to perform in a timely fashion or to keep you updated, you are playing with fire. Therefore, depending upon the size of your company, you might want to time-block 30 minutes each day or three times each week for your PC to do nothing but track orders. Those 1.5 to 2.5 hours per week invested will save you and your staff a world of stress and grief, and enable you to deliver on your promise of a World Class Installation Process.

ROE—Verify all orders

Technology is great...when it works. However we all know that emails, faxes and voice mails get lost. Never assume that the intended recipient got your order. Always get verification. For example, if you email the order, ask the recipient to send you a confirmation. (Don't depend upon the auto-confirmation function in your email.) Then schedule in your calendar an "Order Confirmed" to-do for later in the day. If you still don't have confirmation at that time, pick up the phone and call the person. Do the same thing with faxes and voice mails.

If you fail to do this, you give the other person the power to jeopardize the World Class Service promise we make to our clients. (Remember: always assume the other party will drop the ball.)

ROE—Review all In-Process folders daily

This acts as a fail-safe to ensure that nothing falls through the cracks.

- Review all Task Tracking sheets for clients “In Process”
- Make sure the next step on each Task Tracking sheet is scheduled in the calendar.

ROE—Highlight all completed items on the Task Tracking sheet

As items are completed, mark through the entire line of that task with a yellow highlighter. Anyone who looks at the file will have an instant visual of where we are in the process.

ROE—All activities are cleared daily

Each day, clear all activities. They are cleared in two ways:

- 1) Complete the activity.
- 2) Re-schedule the activity. If you were not able to complete the activity for some reason, schedule it to another day.

At the end of each day your calendar should be completely blank.

NOTE: ACT makes clearing an activity from your calendar easy. Let’s say you have an activity to order product for Mrs. Mouse. When you complete that activity, it automatically logs it into Mrs. Mouse’s notes and histories as “done,” so you have a permanent record that that task was completed. If there’s ever any doubt about whether an activity was done, simply look in notes and histories.

NOTE: ACT makes rescheduling tasks a snap. It gives you the ability to drag-and-drop tasks onto other days in the calendar.

ROE—Job file

Using a manila file-folder, staple the conversation log on the left side (unless you are using your database for the conversation log). On the right side the Task Tracking sheet goes on top and all other documents underneath. Keep these documents clipped together.

ROE—No phone tag—always make phone appointments

How many times have you said, or had someone else say, “I’ll call you back tomorrow”? The big problem with this is it almost always turns into a game of phone tag. This means delays and lots of wasted time.

Instead, schedule phone appointments.

For example: let’s say it’s late in the day and you are talking to a distributor, trying to find out if they can have a certain style of laminate to your store by next Thursday. He won’t be able to give you an answer until tomorrow. Normally, the distributor would

say, “I’ll call you tomorrow.” Instead, say to him, “Let’s set a phone appointment so we don’t have to play phone tag. What time would you like me to call you?” Then schedule it in your calendar.

TIP: always be the one to call the other person for phone appointments. Don’t wait for them to call you.

Follow this procedure for every client, supplier, vendor, contact...everyone. A tiny minority may grumble a bit, but most appreciate it.

This is especially useful for positioning yourself as a highly-organized professional with the client. By making a phone appointment—even for mundane, routine items—you are creating a powerful impression with the client. Excellent “wow” factor.

ROE's In Real Life

In this example, I'm going to walk you through the World Class Installation System using the appropriate ROE's. This process begins after the salesperson gives you the job folder.

In Process

Once you have the job folder, immediately schedule the first 5 items from Task Tracking in your calendar (everything up through "Order product"). You place these on your calendar all at once because they are to be done immediately; within 1 business day of getting the job folder.

After "Product Ordered," every activity must be completed before the next activity is scheduled in your calendar. For example, you don't schedule the "Installation Scheduled" activity until the "Product paperwork in" activity is complete. The reason for this is obvious: all the activities after "Order product" must be done in order, and each activity is dependent upon the prior activity being completed.

This will make much more sense once you read through the example. Also, it's not nearly as cumbersome as it appears when you read it. Once you start using it in real life, it becomes extremely easy.

(PC) Welcome call

- Place the welcome call.
- Clear "Welcome Call" from your calendar
- Highlight & update the Task Tracking sheet.

(MC) Begin RA campaign

- The PC notifies the Marketing Coordinator that the file is now "In process." This signals the MC to immediately send the "Here We Go Letter" and place the client into the Reticular Activator campaign. The RA campaign is a series of sequential, weekly mailers that all In-Process clients receive; it happens simultaneously with the installation process. RA mailers are designed to generate referrals for **YOUR STORE** as well as word-of-mouth promotion.
- Clear "Begin Reticular Activator" campaign from your calendar
- Highlight and update Task Tracking.

(PC) Review job folder

- Review the folder; make sure all items are complete.
- Clear "Review job folder" from your calendar
- Highlight & update Task Tracking.

(PC) Order Product

- Order the product.
- Clear “Order Product” from your calendar and immediately schedule “Order confirmed” in your calendar.
- Confirm the order and at the same time get the ETA.
- Clear the “Order Confirmed” activity from your calendar.
- Highlight and update Task Tracking and master orders board.
- Schedule “Product Received” in your calendar on the date of ETA.
- Schedule “ETA Follow Up” 3 days before ETA.

(PC) Place client on master orders board

- Place client on master orders board
- Clear “Place client on master orders board” from your calendar
- Highlight & update Task Tracking.

(WH) Product received

- On day of ETA, verify with Warehouse that the product has been received.
- Clear “Product Received” from your calendar. (If product was not received, do not clear it from your calendar. Immediately contact the distributor, find out what the problem is and obtain a new ETA. If the new ETA will push the estimated installation date back, contact the client and update them. Repeat this process until the product is actually received.)
- Highlight and update Task Tracking and master orders board.
- Obtain an ETA from WH for “Product Paperwork In,” and enter into your calendar.

(WH) Product inspected

- Inspects product to make sure it’s the same as what was ordered. Also inspects for defects.
- If product passes inspection, proceed to the next step.
- If product does not pass inspection, proceed to **YOUR STORE**’s claims process.

(PC) Product paperwork in

- On day of ETA, verify “Product paperwork in.” Verify that all necessary paperwork was received, including the “Product Inspection” report. (If product paperwork is not in, do not clear it from your calendar. Obtain a new ETA from the WH and put it in your Calendar.)
- Clear “Product paperwork in” from your calendar.
- Highlight and update Task Tracking.
- Schedule “Installation Scheduled” in your calendar.

(PC) Installation scheduled

- Schedule the installation.
- Clear “Installation Scheduled” from your calendar.
- Highlight and update Task Tracking.

- Schedule “Installation completed” in your calendar.

(IN) Installation completed

- Verify with the installer that the installation was completed and get an ETA for “Installation paperwork in” and enter it in your calendar.
- Clear “Installation completed” from your calendar.
- Highlight and update Task Tracking.
- Schedule “Client follow up call” and “Review installation paperwork” in your calendar.

(PC) Client follow up call

- Verify with the client that the installation was done to their satisfaction. (If it was not, schedule a phone appointment between the client and the salesperson. The salesperson handles all initial complaints.)
- Clear “Client follow up call” from your calendar.
- Highlight and update Task Tracking.

(PC) Review installation paperwork

- Review installation paperwork.
- Give follow-up visit paperwork (testimonial and referral request forms) to the MC
- Job file to accounts receivable.
- Clear “Review installation paperwork” from your calendar.
- Highlight and update Task Tracking.
- Schedule “Follow-up visit scheduled” in your calendar

(SP) Follow-up visit scheduled

- Schedule the salesperson to phone the client to schedule a follow up visit. Verify the appointment date and time with the salesperson once he/she schedules it.
- Clear “Follow-up visit scheduled” from your calendar.
- Highlight and update Task Tracking.
- Schedule “Follow-up visit completed” on appointment day given to you by the SP.

(SP) Follow-up visit completed

- Verify with SP that the follow up visit was completed. Verify that referral request forms and testimonial forms are turned in.
- Clear “Follow-up visit completed” from your calendar.
- Highlight and update Task Tracking.
- Schedule “Review follow-up visit paperwork” in your calendar.

(SP) Review follow-up visit paperwork

- Testimonial and referral request forms.
- Give forms to Marketing Coordinator
- Clear “Review follow-up visit paperwork” from your calendar

- Highlight and update Task Tracking.

(MC) Follow-up visit paperwork processed

- Lets the MC know that the job is complete and it's time to send the gift package if the salesperson was unable to hand-deliver it. This also signals the MC to remove the client from the RA campaign.
- MC sends gift package to client.
- MC begins the referral campaign.

World Class Installation System

This section takes each activity from the Task Tracking sheet and “enlarges” it so you can see all the detailed instructions that go into each step. I’ve also inserted a number of sales and marketing strategies and other tips into the process. (NOTE: The Task Tracking sheet is in Excel format, so it’s not printed here. You’ll find it on your CD ROM.)

Pre-Process

(SP) In-store visit/Design audit

- 1) (SP) Client is greeted.
 - i) Small talk. Get to know them. Break the ice.
 - ii) Invite them into your design room. Script: *“You know, floor covering is a critical part of your interior décor, and choosing the right flooring is a major decision. There are many options, and we realize that it can be a little confusing and even overwhelming. To make the selection process easier for you, we have designed a 10-minute Design Audit, where I’ll sit down with you in our design room and get some very basic information from you, and I’ll draw out a rough diagram of your home so I can see your traffic patterns. This will help us narrow the thousands of choices to the best two or three products for your unique situation. Why don’t we head over to the design room and sit down together for a few minutes.”*

- 2) (SP) Design room
 - i) Offer clients a beverage. Don’t say, *“Would you like something to drink?”* Because this gives them the opportunity to say “no.” Instead say, *“What can I get you to drink? We have Pepsi, Diet Pepsi, Sprite, Coffee or bottled water?”* By getting the client to accept the ‘gift’ of something as simple as a drink, they will have a tendency to feel indebted to you. They will want to reciprocate, and are therefore more likely to buy from you.

POWER TIP: Make a laminated beverage menu; hand it to your clients as you ask them what they would like to drink. Good “wow” factor.

POWER TIP: Invest in a fully stocked beverage mini-bar, including fruit juices, gourmet coffee, sodas, bottled water, ice, paper cups with your company name, etc. Invite your clients over and fix them a drink. Jaw-dropping “wow” factor.

POWER TIP: Invest in a small oven and bake cookies and/or bread each morning. These items can be served to all walk-in clients. The aroma will linger in your store, and

your clients will associate it with “home,” “domesticity,” “relaxation.” There are a small handful of dentists and chiropractors who do this to relax their patients. Realtors have been using this strategy for years, and many of them do it when hosting an open house. The olfactory sense is powerful for creating feelings of association, and bread and/or cookies “feel” like home. You can get pre-made bread and cookie dough to make this a quick and easy job done first thing in the morning by an employee.

- ii) Design Audit. This is a questionnaire covering lifestyle, pets, number of children, how long they intend to stay in the house, etc. There are several powerful benefits of the Design Audit form:

First, by actually writing down the client’s responses to your questions, it lets them know that you are actually listening to them and that you truly care about their needs.

Second, it positions you as a trusted advisor, much like a family doctor. Think of all the times have you been to your doctor, and as you described your symptoms he wrote things down in your chart. This has happened to your clients as well, and they will associate you writing down their answers with the care and concern shown by a family doctor or other trusted advisor. (CPA, family attorney, etc. They all do this.)

Third, it lets you know exactly what the clients needs are, and what they are trying to accomplish. This will enable you to make good recommendations. And you can refer back to the ‘Audit’ if they get side tracked during product selection. You can remind them of what they said they are trying to accomplish.

Fourth, it captures their home address and phone number in a non-threatening way. Critical! The client may not buy from you right then, so it’s vital that you capture their contact info so the Marketing Coordinator can send them ongoing, emotional, direct-response marketing pieces (the Shock-and-Awe campaign) until they make the decision to move forward. Also, follow up with them with phone calls until you get a definite “yes” or “no.” During the phone calls, don’t simply ask, “Have you decided yet?” Instead offer them more information about their product, other solutions to their challenges, etc. That way you are perceived as helping rather than selling. This is called being a P.P.P.I.T.B...a Polite, Professional, Pain-In-The-Butt. The follow up calls combined with the Shock-and-Awe campaign give you the tools to do this in a very fun, welcome, interesting way. No other dealer will put in this kind of effort once a client walks out of their store. You’ll immediately stand out.

Birthday: important to capture! So you can send cards and gifts. Important component of maintaining you herd.

NOTE: I don't recommend beginning the Design Audit by asking for their contact information and birthday. It's too abrupt. Begin with all the other questions; they will have warmed up to you by then and most won't hesitate to give you their contact info if you ask at the end. If they ask why you want it, just tell them you like to send birthday cards and maintenance reminders, or some other information.

Also, use of the name short-circuits the brain. When you approach a walk-in client, introduce yourself and get their name up front. Preface some of your questions with their name: "*Jane, what's important about new floor covering...to you?*" Several times throughout the interview use their first name.

The first question on the 'Audit' form is: "*What's important about new floor covering...to you?*" Ask this question, then shut up and listen. This is one of the most important questions on the form. If a married couple comes in, ask each one of them this question and listen to each answer. They will then proceed to tell you exactly what you need to know to sell them flooring. This is called "letting the client paint a target on themselves." By asking both clients this question you may find that they have different goals. You will now be in a position to make recommendations to resolve these differences.

Then go on to fill out the rest of the Design Audit form. At one point the Audit asks about other decorating/remodeling needs. This gives you a chance to up-sell rugs or window coverings if they express interest. If they have other major plans it gives you the opportunity to offer other services and assistance. For example, if they say that in three months they are having their bathroom remodeled, you can give them flooring ideas. And you can refer them to a remodeling contractor that's a strategic alliance partner. (Many remodeling contractors are flakey about keeping appointments, finishing on time, calling if they are going to be late, etc. Unfortunately there is a real lack of professionalism in that business. If you can refer them to somebody who's not like that, who conducts him/herself professionally, you will be a hero! It's worth the time to find a good remodeling contractor as a strategic alliance partner, and explain your expectations ahead of time before beginning to refer.)

iii) Installation discussion.

This is where you will manage expectations, educate the client about the importance of high-quality installation, and set the installer up for success. Don't promise things that your installer can't deliver. (i.e. "Yeah, we can guarantee invisible seams.") Remember that everything hinges on a successful installation, and that the client PERCIEVE it to be a quality installation. Creating this perception begins here.

Draw rough schematic of house.

Have a discussion about the importance of installation. Cover the following points:

- (a) Importance of warranties & guarantees.
- (b) Script: “You are protected by our 100% Iron-Clad Triple Guarantee.”
On your CD ROM (under Forms) is a Guarantee Flier. Have these printed up ahead of time, and pull one out when you get to this portion of the presentation. Go over it with the client point-by-point. The fact that you have printed it out says to the client that you have truly committed to this guarantee.

100% Iron-Clad Triple Guarantee

Guarantee #1 “No Regrets Guarantee!”

Here’s how the “No Regrets Guarantee” works: if at any time during the first 30 days after installation you decide you don’t like your new flooring for whatever reason, just let me know. I’ll replace the materials free of charge. (With an outrageously good guarantee like this, I can’t include the cost of installation, so you’ll have to cover that.)

I offer this amazing guarantee because you’re going to have your new floor for a long, long time, and I don’t want you to have to live with a choice you’ll regret. I want you to be head-over-heels thrilled with your selection. So if you are unhappy with the flooring, I’ll replace it one time free of charge with another style of equal or lesser value. (If the new flooring you select costs more, you simply pay the difference.)

If you walked into any other flooring store and asked them for a guarantee like this, they will probably laugh and tell you “no way!” So how can I offer such a powerful guarantee? I couldn’t unless I was absolutely confident in the quality of my products and service. I am confident, and you will be, too...I guarantee it!

Guarantee #2 Lifetime Installation Warranty

Buying flooring is not like buying any other piece of interior décor, such as a sofa or a lamp. Why? Because unlike other products, flooring is installed or “manufactured” in your home. This makes the installation critical. I offer a lifetime installation warranty at **YOUR STORE**. You NEVER have to worry about something going wrong with the installation. If it does, I’ll fix it FREE! And I’ll do it quickly.

Guarantee #3 Installer Professionalism Guarantee

YOUR STORE installers are neat, clean, well-groomed, well-spoken and professional. They are trained and certified. They are guests in your home, and they conduct themselves as such. They respect your home by using wall and corner guards, shoe covers and drop cloths. You’ll receive the highest-quality installation in the business. And after they’re finished, they will leave your home as neat and clean as when they arrived!

- (c) Go over any stain/wear warranties particular to the products you are showing them.

- iv) Hand client a portfolio of testimonials. As you hand it to them, say *“I need to get some additional information for you, and it will take me just a couple of minutes. While I do that, I’ll let you look through this.”*

At some point during the design room meeting, the client needs 5 minutes to look through the testimonial portfolio. During this 5 minutes, the salesperson should have something to do, such as get information, go to the restroom, add up estimated square footage...something.

No matter how eloquent you are at telling the client about the quality of your store, it always sounds 10 times more convincing coming from SOMEONE ELSE. That’s the power of testimonials: they give you a ‘halo’ of credibility.

This portfolio of clients raving about your service will do 80% of the selling for you. AND it drastically reduces price resistance. When the time comes for you to quote a price, or the client is looking at prices on your showroom floor, she will remember the testimonials and come to the conclusion that, “Wow, all these other people paid this price, and they were super happy. These prices must be reasonable.” Testimonials are a MAJOR KEY to selling at higher prices than your competitors.

POWER TIP: Create a “Brag wall.” In your design room (or wherever you sit down to fill out the design audit) have a corkboard filled with testimonials, photos of happy clients, etc.

POWER TIP: Have a television in the showroom (and in the design room) playing a DVD of super-happy clients in their home talking about how happy they are with their new flooring. This DOES NOT need to be a high-cost production. Merely take an assistant and a digital video camera on your follow up visits. Say to the client, *“I need your help. We are looking for ways to expand our business. Would you mind doing a 3-minute interview with me about your experience with our company while my assistant records it?”* Once you have 5 or 6 of these, load them onto your computer and burn it to DVD. If you don’t know how to do this, a video production company can do it inexpensively. This footage should be raw, with little editing, and without music or fancy graphics. This will look more “real” to clients who visit your store. Play it on a continuous loop throughout the day on your TV.

POWER TIP: For your phone system, use recorded testimonials instead of “on-hold” music. Instantaudio.com is an inexpensive, hassle-free way to record client testimonials. You simply dial an 800-number on your cell phone, hand it to your client and they record their testimonial into your account. These testimonials can be downloaded to mp3 and burned to CD. These recordings can be used on websites, audio postcards, phone systems, CD’s for your client welcome pack, etc.

3) (SP) Product selection.

- i) Show clients samples based on their needs. The Design Audit will have given you the tools you need to help them with the selection and make recommendations.
- ii) Schedule an in-home visit. Don't say, "*Would you like to schedule an in-home visit?*" This gives them the choice of saying 'yes' or 'no.' Don't give them this choice. Instead say:

"The next step is to schedule an in-home visit where I will measure and inspect the areas where the floor covering is to be placed. Then I can determine exactly how much product to order. Also, an on-site visit allows me to see potential installation challenges, or other issues ahead of time, and to make sure you get a World Class Installation, and the perfect flooring for your home. I'll also give you an exact, written quotation on the cost. Are mornings or afternoons better for you?"

This script lets the client know how critical the in-home visit is, and it gives them a choice of mornings or afternoons: not yes or no.

Hand them a welcome pack which includes testimonials, product info, and the Consumer's Guide To Floor Covering.

Take the client over to the Project Coordinator and schedule the in-home visit.

- 4) (SP) Gives Design Audit to PC
- 5) (PC) Creates Job Folder and enters client contact info into database.
- 6) (PC) Site-visit confirmation letter sent.
 - i) Reminder call scheduled. The day before the in-home visit, the PC calls and reminds the client. Leaves a message if no one is home. (Reminder calls should be a daily task of the PC. Reminder calls should be made for ALL the following day's in-home visits, installations, follow up visits, etc.)

What to do if the client does NOT schedule an in-home visit:

This does not mean you have lost the sale; however follow up will be critical. If you have not obtained the client's contact info, and they have told you they want to shop around some more, use the following script:

"I understand. I'd like to send you some 'floor shopping' tools to help you get the best deal on flooring, avoid predatory floor dealers, and give you 5 questions to ask a dealer before you buy anything. What's your address so we can send that right out to you?"

(NOTE: this script describes the Consumer's Guide. If you see that you will not get an in-home appointment, don't immediately hand them the Consumer's Guide. Offer to send it to them so you can get their address. If they STILL won't give you their address, then hand them a copy as your last resort.)

Give their contact info to the PC, who will upload it into the database.

(PC) Notify the Marketing Coordinator to begin the Shock-and-awe campaign. (In your kit.)

(MC) After completion of the Shock-and-awe campaign, if they still haven't made an in-home appointment, plug the client into your monthly client newsletter campaign for 1-2 years. A surprising number of these people won't go to some other store. They'll simply delay the purchase of new flooring. By sending them your newsletter every month, you will be doing what 99.9% of other dealers will NEVER do, and when the client is ready to purchase there's a very good chance they'll come back to **YOUR STORE**.

(SP) Schedule follow up calls. If the client says, "Yeah, we're going to wait until after school starts to get flooring," schedule a follow up call in September. This, coupled with the Shock-and-awe campaign and the monthly newsletter, will make it VERY likely that they'll use you if they are ready to buy at that time. (Of course, if a client says they want to wait, give them a compelling reason to buy right then. If they still want to wait, then plug them into the Shock-and-awe campaign.)

(SP) In-Home visit

1) Arrival

- i) Call the client on your cell phone when you are 5 minutes away and let them know you will be there in a few minutes.
- ii) Don't park in the driveway; park on the street.
- iii) After knocking, stand 4 feet back from the door.
- iv) Greeting—after the client opens the door, stop in the entryway and put medical booties on your shoes. Without saying a word, you have just told the client that you care about her home, that your company is going to be very careful not to cause damage, and that your company is serious about providing World Class Service. Plus, NO ONE else does this! You will instantly set yourself apart from the competition.

NOTE: you can get vinyl medical booties from JonDon.com.

2) Review the layout/Fill out pre-installation checklist.

- i) Ask the client where you can sit down to review the layout. Take 10 minutes to go over the drawing you made in the design room and briefly recap the client's goals.
- ii) Go through the pre-installation checklist.
- iii) Review the "Client satisfaction survey." Say, "*We are so serious about providing World Class Service that we survey each client to make sure the job*

was done just right. When the installer finishes the job, he will give you a Client Satisfaction Survey. Please be sure to send it in so we can continue to improve our service.”

- iv) Reasons for the visit. Tell her that while you are here you will not only be measuring the rooms, but also assembling a maintenance plan so she will get the longest life out of her flooring.

3) Inspection

- i) Survey the job site
- ii) Measure the rooms
- iii) Discuss seam direction and placement, and other particulars. Manage client expectations, especially regarding seams. Let her know that your installer will do his best to hide seams so they don't show, but it's virtually impossible to hide them completely with short or loop pile. Under promise, over deliver.
- iv) Determine who is going to move the furniture.
- v) Ask to look at her vacuum. Let her know that the vacuum is the number one tool for good maintenance and you want to make sure it's working properly and doing an adequate job. When inspecting the vacuum, turn it over; make sure the brushes aren't worn down; plug it in and turn it on; make sure it has adequate suction. Remember: YOU are the floor covering & maintenance expert!
- vi) Look at placement for walk-off mats. Obvious areas are entryways from the garage, front door, and rear door. Explain that walk off mats need to be large enough so that a person can take four steps on them; this will remove most of the soil. This is especially important with garage entryways where there is oil, and rubber from black tires that gets tracked in.
- vii) Ask to see the spotting cleaners she uses on her carpet. Most people use Resolve or Quik-n-Brite or other garbage they get from the supermarket that leaves a sticky residue or causes fading. Explain to the client why she does NOT want to abuse her new carpet with these products. Gather them up and set them on her counter and recommend to her that she throw them away. Let her know that your store has some outstanding spotters that won't damage her new carpet.
- viii) Find at least two up-sell items. Fast food companies do it on every order. *“Would you like fries with that?”* By asking every single customer for the up-sell, fast food restaurants sell a ton of food they wouldn't have if they hadn't simply asked. There's no reason you can't do the same thing.

Up-sell items can include additional rooms, entryway tile that doesn't match the new carpet, area rugs, counter tops, entry rugs, walk-off mats, a new vacuum, hard-surface cleaning kits, spotting kits, etc. Include these as separate items on your quote.

When going over the quote say, *“I couldn’t help but notice that your old entryway tile won’t match the new carpet. I’ve included a quote for a new entryway.”* Or *“Your old vacuum has lost a lot of its suction power and I’d hate to see you sacrificing good maintenance after you’ve invested in new carpet. I’ve included a quote for a powerful, top-quality vacuum that we carry. The bags are allergy-free and it’s guaranteed for five years.”* This is a very low-pressure way of asking for the up-sell.

What if half of your clients opted for additional items? How much extra money would you make each year? Would it be worth putting forth the effort to make the request? Absolutely.

- ix) Future up-sell items. Through your conversation with the client, you may discover that in six months they will be remodeling certain parts of their home, building an addition, etc. Ask if you can measure these areas and keep it on file for future reference. When you get back to the office, schedule a follow up call for six months down the road.

NOTE: ACT makes this easy. It can also be set to alarm you when the time comes for the call back.

- x) Written maintenance plan. (There is a page in the Design Audit form to do this.)

Explain why maintenance is so important. Tell her that based on her family’s lifestyle, number of kids, and pets you have assembled a custom maintenance plan that will ensure she gets the longest life out of her carpet.

A written plan might look something like this:

Vacuum: 2 times per week. General spotting as you vacuum.

(Script: *“Regular vacuuming with a quality vacuum removes invisible, abrasive soil which is harmful to carpet fibers.”*)

Professional cleaning: every six months.

(Script: *“Cleaning by a certified, professional carpet cleaner will improve indoor air quality, double carpet life, and protect your traffic lanes.”*)

Host or Capture/dry particulate cleaning: twice yearly, between professional cleanings.

Matting: place walk-off mats at front entry, rear entry, and garage. Make sure garage mat(s) are long enough to take four steps on.

(Script: *“If you can take 4 steps on a mat, 95% of the soil will be removed from your shoes.”*)

Clean mats: twice per month.

(Script: “Once the mats are full of dirt they stop working. It’s important to keep them clean.”)

For 90% of the clients you will give the same recommendations. That’s okay; resist the urge to hand out a pre-printed maintenance plan. NO OTHER floor covering store will give her a written, customized maintenance plan. This will position you as an expert and trusted advisor, and separate you from your competition.

- xi) Assemble the quote
 - (a) Let her know that you don’t do ‘estimates.’ Instead, you give guaranteed price quotes that she can count on. No last minute price changes. This will set you apart from all your competitors.
 - (b) Go over each item on the quote.
 - (c) Go over the up-sells. Explain why you are recommending them, but don’t push it. Just give her the option.
 - (d) Briefly recap the warranties & guarantees
 - (i) No regrets guarantee
 - (ii) Lifetime installation warranty
 - (iii) Installer professionalism guarantee
 - (iv) Any other stain/wear warranties particular to the product you are selling.
 - (e) Go over the World Class Installation
 - a. Let her know she will be kept updated throughout the process.
 - b. Installation checklist—let her know that at the end of the installation, the installer will do a walk-through with her, and provide a 27-point quality checklist to make sure the job is done to her satisfaction.
- xii) Financing. Ask if she is going to pay cash, or if she would like to look at your financing options.
- xiii) Take the order. Assume the client is going to order right then. Slide the work order to her with a pen and say, “I just need your signature right here, and we can go ahead and get your product ordered.”

If the client wants to think about it, of course try to overcome any objections that are making her hesitate. But if she truly needs to think it over, discuss with spouse, etc., leave the quote and make a phone appointment to call back in 24 hours. Then DO IT! Prove that you’re reliable! That you’re a pro! That you’re different!

Call when you say you’ll call, show up on time, and do what you say you’ll do. Most of your competitors don’t do this, and if YOU DO, you’ll instantly set yourself apart.

xiv) Plant the referral “seeds.” Use the following script.

“Your referrals happen for two reasons: you trust us; and we are delivering beyond your expectations.

“Most floor covering companies spend 90% of their time trying to find new business with the general public. We dedicate this time and energy to providing our clients with World Class service that is above and beyond expectation. In turn, we offer the same level of service to your friends, family and co-workers who refer to us.

“In return we need your help. If you feel that we are exceeding your expectations, then we need your endorsement to those in your sphere of influence. You will notice more people talking about flooring while you are in the installation process, it would benefit you to refer those people to us during your transaction. We can then invest more of our time and energy into taking care of your needs.

“I also want to tell you about our Referral Rewards program. Advertising is very expensive, so instead of spending a lot of money on newspaper ads and other things, I’d rather reward you.” (Explain the program.)

“Here are two of my business cards. If the subject of flooring comes up in your conversations with people you know, can I count on you to hand them out?”

xv) 33 Types of Turbulence list. (Turbulence list and turbulence letter are in your kit.) The Turbulence list, and the pilot analogy are powerful tools in managing the expectations of the client. Use the following script:

“Buying floor covering is like taking an airline flight cross country. As your Floor Covering Consultant, I see myself as the pilot of your plane. My job is to assist you in getting your floor covering in the least time, with the least aggravation. Here is a list of the kinds of turbulence we might hit. I can’t promise you no turbulence, but I can promise that I’ll utilize my experience and expertise to take you on the smoothest flight that I can. And if we do hit turbulence, I won’t bail out on you. I’ll be your teammate throughout the flight until we get you safely to your destination.”

POWER TIP: Whether you take the order that day or not, after you leave the house, call the client from your cell phone. Say, *“You know, we covered a lot of information and sometimes folks think of questions after I leave. Do you have any more questions or concerns that I can address?”* High “wow” factor. NO OTHER store will do this.

3. (SP) Job Folder completed turned in to PC

The “football” is about to be handed off to the PC. To avoid fumbles, each time the football is passed, ALL paperwork up to that point MUST be completed.

- Complete installation packet
 - diagram of house
 - work order
 - job worksheet
 - purchase order
 - installation agreement (Checklist—in this kit)
 - sales contract
- Insurance work also include:
 - Authorization to repair, signed
 - Certificate of satisfaction (completely filled out minus client signature)

In Process

Once you have the job folder, immediately schedule the first 5 items from Task Tracking in your calendar (everything up through “Order product”). You place these on your calendar all at once because they are to be done within 1 business day of getting the job folder.

(PC) Welcome call

Script: *“Hi, this is Sheryl Smith the Project Coordinator with ABC Flooring. We met the other day when you came into the store. I’m just calling to give you the good news that your installation is now in process and I will be coordinating the installation, and I’ll be your point of contact until it is completed. I will be updating you at key points during the process.”*

1. Product arrives
2. Appointment confirmation

I will be working closely with SALESPERSON during the entire process.

I couldn’t help but notice that you didn’t include Everguard or a cushion upgrade, and I wondered if this was an oversight. (Briefly explain the benefits.) Would you like to add these benefits to your order?

Give the PC a commission on any upgrades that she sells.

If you have any questions or concerns, please don’t hesitate to call. Either I or SALESPERSON will help you any way we can. Here’s my direct number so you can call me anytime between 8:30 and 5:00, Monday through Friday.”

If your PC is part time, she can say, “Here’s my direct number so you call me direct. My office hours are Monday, Tuesday, and Thursday between Noon and Five.”

(MC) Begin RA campaign (In your kit.)

- PC notifies the MC that the client is now in process.
- MC begins the Reticular Activator campaign

(PC) Review Job Folder

- Complete installation packet
 - diagram of house
 - work order
 - job worksheet
 - purchase order
 - pre-installation checklist

sales contract

- Insurance work also include:
Authorization to repair, signed
Certificate of satisfaction (completely filled out minus client signature)

(PC) Order product

- Gather ETA's for products
- Notify salesperson on back orders; especially if back order product will not arrive until after a special scheduling date. Client may request job to be completed "A week before Christmas," rush job, etc. Sales person may have given client a second color choice in case first choice is not available in a timely fashion.

(PC) Place client on master orders board

Master Order Board is a dry-erase board that everyone can see and get a quick visual of the order's progress. You may or may not need it, especially if you're using the World Class Installation System with a calendar. However, some stores find it helpful. Here is a sample layout.

Client name	Order date	ETA date	Recieved	Tracking #

Color coding:

Carpet Blue
Hardwood/laminate Black
Vinyl/tile Red

GREEN—received date written in green for all products.

(WH) Product received

(WH) Product inspected

- Inspects carpet or vinyl product for proper size, color, style and imperfections (Accu-cut machine is excellent for this. www.accu-cut.com. Also E-Z Cut at www.ezcut.com.)
- Items ordered by the piece must be counted individually
- Items ordered by the box, count the boxes
- Laminate; check for accurate number of planks, linear foot
- Etc.
- If product passes inspection, proceed to "Product paperwork in"

(WH) Claims—for defective/incorrect product

- If product is incorrect in size, color, style, claims process begins.
- If product has imperfections, PC is immediately notified and determination is made whether product is salvageable (i.e. damaged area can be cut away and still have enough material to complete the job)

(PC) Product paperwork in

- PC gets the purchase orders attached to the receiving documents.

(PC) Installation scheduled

- Phone client and schedule the installation

(IN) Installation completed

As the installer, you are an ambassador of **YOUR STORE**. When the client sees you, the client sees **YOUR STORE**. Clothes should be clean and in good repair. Always wear a polo shirt with the company logo. Your van should be clean and neat, inside and out. The doors to your van will be open as you are working, and if the client sees fast-food bags and other stuff, it tells her that you might not be neat in her home. No smoking on the job site. Any cleaning of tools should be done at your van.

Ask ahead of time which bathroom the client would like you and your crew to use.

1) Arrival

- i) Call the client on your cell phone when you are 5 minutes away and let them know you will be there in a few minutes.
- ii) Don't park in the driveway; park on the street.
- iii) After knocking, stand 4 feet back from the door.
- iv) Greeting—introduce yourself and your crew.
- v) Before entering the house, put on the medical booties. Don't track anything in.

2) Review the job with the client

- i) Recap everything that you will doing that day. Briefly explain how you will proceed and approximately when you will be finished.
- ii) If there are children or pets, politely make sure they will be kept out of harm's way. Say, *"We like children and pets, and we want to make sure they are kept safe. It's important that they not be allowed into the work area."*

3) Job prep

- i) Lay down drop cloths. If you are crossing an area that isn't part of the job order, drop clothes will keep you from tracking in dirt, and it tells the client you respect her house. After the drop cloths are down the medical booties are not necessary.

4) Installation

5) Clean up

- i) Vacuum thoroughly. Make sure you get behind all doors and inside closets.
- ii) Sweep any hard surfaces you installed, or hard surfaces you walked across to get to the installation area.
- iii) Clean any countertops or tables of dust or debris from the job.
- iv) Walk through. Look for any missed tools, razor blades, etc.
- v) Check the bathroom. Make sure the bathroom used by you and your crew is as clean as when you arrived.
- vi) Fill out the “Quality Checklist.”
- vii) Collect payment if due. (Terms of payment are determined at point of sale.)

NOTE: NEVER use the client’s trash can. Carry your own plastic trash can from room to room and haul everything away.

6) Client walkthrough

- i) Encourage the client to thoroughly inspect the job as you move from room to room. Have her look in closets, behind doors, etc. You want her to be convinced that the installation is satisfactory.
- ii) Compliment her on how nice the flooring looks, what a good choice she made, etc.

7) Client survey

- i) Go over the warranty.
- ii) Remind her of the custom Maintenance Plan the salesperson made for her. Stress the importance of good maintenance.
- iii) Hand the client the envelope with the client survey. Say, *“I need your help. We take client satisfaction very seriously, and your client survey will help us continue to provide World Class Service. Will you fill it out and send it in for me?”*

8) Installation paperwork to the PC—checklists, invoice, etc.

(PC) Review installation paperwork

- This is an accountability step. If forms are missing or incomplete, they should be given back to the installer for completion.

(PC) Client follow-up call

- Phone client and make sure they are satisfied with the installation. If they are, proceed to next activity.
- If there is a problem with the installation, schedule a phone appointment between the SP and the client.

(SP) Follow up visit scheduled

- Phone the client and schedule the follow-up visit.
- MC prepares the gift basket. Gift package letter (in your kit). Assemble a movie themed gift basket with “movie” sized candies, bottled water, micro-wave popcorn, and a \$5 gift certificate to a local video store. Also include a magnetic memo-board/calendar with your contact info. The salesperson to hand-deliver during the follow up visit. (In the Rapid Launch manual are detailed instructions for the gift basket and letter.)
- You can use this as the opportunity to hand-deliver the gift pack prepared by the MC. You can tell the client you have a gift for them, and you would like to see their new “dream floor.”

(SP) Follow up visit completed

The main purpose of the follow up visit is three things:

1. Make sure the client is satisfied.
2. Get referrals.
3. Get testimonials.

1) Arrival

- i) Call the client on your cell phone when you are 5 minutes away and let them know you will be there in a few minutes.
- ii) Don’t park in the driveway; park on the street.
- iii) After knocking, stand 4 feet back from the door.
- iv) Greeting—after the client opens the door, stop in the entryway and put medical booties on your shoes.

2) Give the client her gift basket

3) Walkthrough

- i) Compliment the client on her choice of floor covering. Tell her how nice it looks, etc.
- ii) Remind her of the warranty
- iii) Remind her of the maintenance plan.
- iv) Address any concerns.

4) Take her photo. Use the following script:

“You’ve seen all the testimonials and photos from happy clients. It would sure be an honor to take a photo of you and your new flooring so we can share your success with our other clients. Would that be okay?”

If you have an assistant take the photo, you can stand with your client and her family in the photo.

POWER TIP: Get an audio or video testimonial. Occasionally you will have a client that you and your store really connect with. She is thrilled with the service, raves about the carpet, promises to tell her friends about you, etc. You know the kind of client. This

is a good one to ask if you can get a video or audio testimonial. This enthusiasm will really show on the audio and video, and she is likely to agree to your request. Instantaudio.com makes it super easy to get audio testimonials.

- 5) Referral Reward program. (In your kit is a Referral Rewards program with all your referral-generating tools.)
- i) Go over the Referral Rewards program which is explained on the Referral Request form.

Script: *“I’d like to tell you about our Referral Reward program. It’s a way you can get free night out at the movies and give a free gift to your friends.”*

Go through each of the benefits, including the Bonus Reward for filling out all ten names.

Request a testimonial. On the Referral Request form is a page for a testimonial. When you get to this part of the form say, *“I need your help. We’re looking for ways to expand our business and a testimonial from you would really help. You seem very pleased with the service you received; would you mind giving us a testimonial?”*

Something to keep in mind: getting referrals, testimonials, videos, and photos is a numbers game. Most people will agree to give you something; some will agree to give you everything; some will give you nothing.

DON’T BE AFRAID TO ASK!

If you’ve provided excellent service, you have earned the right to ask for these things.
The worst they can say is “no.”

(PC) Review follow-up visit paperwork

- Referral and testimonial request forms.
- This is an accountability step to make sure these forms are being filled out. If they were missed, the SP must go back to the client and have them filled out.
- If the client refused to provide referrals or testimonials, this should be written on the form along with the reason why if known. If it’s because of a complaint, the time to address the problem is during the follow up.
- Turn them in to the Marketing Coordinator (MC) after review.
- Job file goes to accounts receivable.

(MC) Follow-up visit paperwork processed

- Begin referral campaign.

Marketing Coordinator (MC)

Message to the store owner

The job of the Marketing Coordinator is to implement marketing campaigns and strategies. In this section of the manual, I am going to focus on 3 distinct campaigns to be implemented by the MC:

1. Shock-and-awe campaign
2. Reticular Activator campaign
3. Referral letter and drip campaign

The reason I am focusing on these particular campaigns is because they are part of the World Class Installation System.

NOTE: The Rapid Launch manual has all the letters in these three campaigns printed out along with detailed instructions. They are also on your CD ROM.

There are many other marketing campaigns and strategies in this System. I recommend assigning the MC to implement all marketing campaigns.

Your business may not be large enough at this point to justify a full-time MC. That's okay, simply assign the position to another member of your staff. (Or hire a part-time college student, or semi-retired person, etc., for a few hours each week. Knowledge of the flooring industry is not required for this position.) Have that staff member block out several 2-hour time slots during the week to do nothing but handle MC activities. This is called "time blocking." During this blocked time—while this staff member is wearing the MC "hat"—he/she is not to answer phones, return emails, be interrupted by other staff members, or do anything other than implement marketing campaigns. **This time is sacrosanct.**

Why? Because marketing is the lifeblood of your business. Nothing happens in business until the client gives us money; every other activity exists solely to support "getting the clients to give us money." And marketing is the powerful catalyst that gets clients to give us money.

Beginning scuba diving students are taught "ABC": Always Breathe Continuously. This is because without oxygen you will die, and underwater distractions, the environment, etc., can cause new scuba divers to forget to breathe.

As a student of marketing, I want you to remember "AMC": Always Market Continuously. Marketing is the oxygen of your business and without it your business will die. Don't allow distractions like answering phones, filing things, putting out fires, or other day-to-day "stuff" keep the MC from continuous marketing.

Shock-and-Awe campaign

The Shock-and-Awe is an intensive 4-week campaign consisting of sequential mailings to prospects who have visited **YOUR STORE**, but have not made a buying decision. When a prospect leaves the store without making a commitment to purchase, the SP notifies the MC that the prospect needs to be placed in the Shock-and-Awe campaign. At that time, the MC not only begins the Shock-and-Awe, but also subscribes the prospect to the monthly client newsletter.

During this 4-week campaign, the SP is making continuous follow-up calls with the client as described in the pre-process section of this manual. The Shock-and-Awe campaign will make these calls far more effective.

This campaign is designed to do several important tasks:

- Knock fence-sitters off the fence; get them to buy from **YOUR STORE** NOW
- Keep prospects thinking about **YOUR STORE** until they decide to buy
- Compel people to talk about **YOUR STORE**
- Compel potential clients to use **YOUR STORE** rather than the competition

After the Shock-and-Awe, if the client still is not ready to buy, keep them subscribed to the monthly newsletter for 1-2 years. You'll get enough of these people back within the first year to pay for the extra investment in newsletter costs.

Implementation

Time block one day per week for Shock-and-awe. Use a simple Excel spreadsheet to track which mailers need to go out.

NOTE: ACT can be customized to track this for you.

Here's a sample spreadsheet:

Prospect name	Salesperson	Shameless Bribe	Headache mailer	Lifesaver Mailer	Ball is in your court	Offer Deadline
Donald Duck	Bob Jones	7/9	7/16	7/23	7/30	8/9
Mickey Mouse	Bob Jones	7/16	7/23	7/30		8/16
Minnie Mouse	Sally Sims	7/16	7/23	7/30	Purchasing	8/16
Pluto Dog	Sally Sims	7/23	7/30			8/23
Goofy Dog	Bob Jones	7/30				8/30
Bugs Bunny	Sally Sims					

Let's say that your Shock-and-Awe schedule is time blocked for Mondays. You look at your spreadsheet on Monday, August 6th and do the following:

- Donald Duck is done with the campaign. Notify Bob Jones that the "Ball is in your court" package went out on 7/30. Bob will decide how to follow up based on his conversations with the prospect. Donald will continue to get the monthly newsletter for 1-2 years.
- Mickey Mouse is sent the "Ball is in your court" mailer.
- Sally Sims let you know on Friday that Minnie Mouse has decided to purchase, so you remove Minnie from the campaign.
- Pluto Dog is sent the "Lifesaver" letter.
- Goofy Dog is sent the "Headache" letter.
- The Bugs Bunny lead was given to you today by Sally Sims. Bugs is sent the "Shameless Bribe" letter and subscribed to the monthly newsletter for 1-2 years.

Reticular Activator Campaign

“What the heck is a Reticular Activator???”

It’s very simple. Your RA is a filter or a screen that allows your brain to only sense certain things that otherwise you wouldn’t notice. For example, the last time you bought a car, all of a sudden you started seeing cars just like yours all over the road. Pregnant women seem to notice other pregnant women everywhere. When you buy a new pair of shoes, you notice other pairs exactly like your brand new ones. That sort of thing is what your RA notices.

When people are in the middle of buying new floors the same thing happens. They notice floors everywhere, it comes up in conversation, they day-dream about their dream floor, etc. During this CRITICAL period the client is “Hot” when it comes to providing referrals.

The RA campaign is a step-by-step series of mailers that takes advantage of this “Hot” period. This campaign allows us to generate an average of 7 referrals from each sale. Here’s how:

At the end of the World Class Installation Process, the Salesperson will present the client with a Referral Request form. For four weeks prior to that, the RA campaign will have conditioned the client to give referrals, and educated them to all the benefits & rewards of providing us referrals. So when the SP finally hands the Referral Request form to the client at the end, they are much more likely to fill it out. Also, the RA campaign will sometimes generate referrals DURING the installation process, even before they are given the Referral Request form.

The RA campaign—along with the Referral Request form—enable us to average seven referrals from each sale...which means every single sale can “generate” at least one more sale, and sometimes as many as 2 – 3 more.

DO NOT gloss over the powerful implications of this! Imagine if every sale spawned just ONE more sale (Never mind the occasional 2 - 3 more, which is definitely possible with this system).

- Advertising costs drop
- Revenue goes up
- Makes the seasonal ups-and-downs in revenue less extreme
- Referred clients are FAR easier and more profitable to work with than clients generated from cold advertising.

RA campaign mailers go out weekly; time block one day a week to do them. Again, use a simple Excel spreadsheet to track which mailers need to go out.

NOTE: ACT can be customized to track this for you.

Here's a sample spreadsheet:

Client name	Salesperson	Here we go/Ducks in a row	Turbulence letter	RA letter	Lotto letter	Gift pack
Elmer Fudd	Bob Jones	7/2	7/9	7/16		
Daffy Duck	Bob Jones	7/16				
Porky Pig	Sally Sims					
Sylvester Cat	Sally Sims	7/9	7/16			
Tweety Bird	Sally Sims	6/25	7/2	7/9	7/16	

Let's say that your RA schedule is time blocked for Mondays. You look at your spreadsheet on Monday, July 23rd and do the following:

- Elmer Fudd is sent the Lotto letter
- Daffy Duck is sent the Turbulence letter
- When the PC notifies the MC that Porky Pig is now "In Process," Porky is immediately sent the Here We Go letter along with the Ducks In A Row letter. "Here We Go" and "Ducks" are always sent out within 1 business day of the client going "In Process," regardless of what day it is.
- Sylvester Cat is sent the RA letter
- The Gift Letter and gift package are prepared and either sent out, or given to the SP to be hand delivered.

Referral letter & drip campaign

The Referral letter is sent to all the people on the referral form. You can test different offers, always tracking for results. Sometimes a referral was told by their friend about your service and is expecting a call. In that case, follow up the letter with a phone call. (If you call them without permission, make sure to run their names through the do-not-call registry.)

Drip campaign

Some people will only give you one or two referrals (or none), and some will fill out all ten names to get the free gift. You should be able to average 6-7 referrals for each job. Many of them may not need flooring right then, but they might down the road. Since you were "introduced" to them by their friend, when the time finally comes that they do need your services, you will be the top contender for their business. Therefore you want to "drip" on these hot prospects for 1-2 years. Use the monthly newsletter to do this. Also send them any other marketing you send to your past clients.

Forms

On the following pages are the forms used throughout the World Class Installation System. You also have these on CD ROM. The marketing letters (RA Letters and Shock-and-Awe campaign) are printed out in the 60-Day Rapid Launch Manual. (Again, I recommend printing out copies of all marketing pieces so each team member has a copy.)

These forms can be easily adjusted to fit your store.

Design Audit

Salesperson. Used for the initial consultation. Detailed instructions given earlier in this manual, and in the 60-Day Rapid Launch.

Guarantee Flier

Salesperson. Used during initial consultation. Detailed instructions given earlier in this manual.

Installation agreement

Salesperson. Used during the in-home visit.

World Class Installation Checklist

Installer. Goes over it with the client after the job is completed.

Client Feedback

Installer. Gives this to the client after the job is completed. Include a self-addressed, stamped envelope.

Referral Request Form

Salesperson. Goes over it with the client during the follow up visit. Detailed instructions given in this manual and the 60-Day Rapid Launch.

Referral Request—letter to the referrals

Marketing Coordinator. Sends this to all the people who were referred on the Referral Request Form. Detailed instructions given in this manual and the 60-Day Rapid Launch.

Task Tracking Sheet—on CD ROM

Project Coordinator. Used to track all tasks throughout the World Class Installation System. This form is an Excel spreadsheet, and located on your CD ROM. (This manual is in Word format, so it's not printed here. I recommend printing several copies and keeping them with this manual for reference and training purposes.)

Your Store Name
Your store phone number
Design Audit

Date _____ Appointment Day, Date & Time _____

Name _____

Address _____

City _____ State _____ Zip _____

Phone (Home) _____ Alternate Number _____

E-Mail _____ Fax _____

How did you hear about us? (Source) _____

Previous client? Yes _____ No _____ Birthday and month: ____/____ ____/____

What's important about new flooring to you? _____

Level of traffic (Occupants in the home)

Number of adults _____ Number of children and their ages _____

Indoor Pets _____

Does anyone have allergies or other respiratory problems? Yes _____ No _____

If yes, describe _____

What kind of flooring do you currently have? _____

How old is your flooring? _____

Maintenance

Are walk-off mats being used? Yes _____ No _____

Vacuum Type

Upright _____ Canister _____ Central _____ Which brand? _____

How often is the carpet vacuumed? _____

Cleaning

Has the carpet been cleaned before? Yes _____ No _____

What methods have been used?

Absorbent Compound _____ Hot Water Extraction _____ Do it yourself _____

How often is the carpet cleaned on average? _____

Type of carpet fiber

Synthetic _____ Natural _____

What do you like about your flooring? _____

What do you dislike about your flooring? _____

What are your expectations for new flooring? _____

Is there anything you are especially concerned with? _____

Have you ever had floor covering installed before? Yes _____ No _____

Professional _____ Do it yourself _____

What did you like about the experience? _____

What did you dislike about the experience? _____

What can we do to exceed your expectations? _____

Other decorating/remodeling needs? Window coverings _____ Area rugs _____

Cabinets _____ Counters _____ Bathroom _____ Kitchen _____ Paint _____

Other _____

How long will you be in your home? 0-3 yrs _____ 3-5 years _____ Over 5 yrs. _____

Notes: _____

Prescription

YOUR STORE's Professional Recommendations For Maintaining Your Floor's Health, Beauty, and Life.

Carpet maintenance & cleaning

1. Walk-off mat placement _____

Walk-off mat vacuuming frequency _____ Washing frequency _____

If you can take 4 steps on a mat, 95% of the soil will be removed from your shoes.

2. Vacuuming Frequency _____

- Regular vacuuming removes invisible, abrasive soil which is harmful to carpet fibers.

3. Professional Carpet Cleaning Frequency _____

- Benefits professional carpet cleaning:
- Doubles carpet life
- Protects traffic lanes

4. Host/Capture dry particulate cleaning _____

5. Spot cleaning. DO NOT use spotters from the grocery store or hardware store on your new carpet. They can leave sticky residues that attract dirt, and/or cause fading. We carry a full line of spotting products that do a great job and are not harmful to your carpet.

Hard Surface Cleaning

Type of surface _____

Type of cleaner _____

Cleaning frequency _____

Cleaning instructions _____

Your flooring is an investment in the beauty and value of your home. By following these recommendations you will ensure greater enjoyment and a long life for your flooring!

your store's information

You are protected by our...

100% Iron-Clad Triple Guarantee!

Guarantee #1 “No Regrets Guarantee!”

Here’s how the “No Regrets Guarantee” works: if at any time during the first 30 days after installation you decide you don’t like your new flooring for whatever reason, just let me know. I’ll replace the materials free of charge. (With an outrageously good guarantee like this, I can’t include the cost of installation, so you’ll have to cover that.)

I offer this amazing guarantee because you’re going to have your new floor for a long, long time, and I don’t want you to have to live with a choice you’ll regret. I want you to be head-over-heels thrilled with your selection. So if you are unhappy with the flooring, I’ll replace it one time free of charge with another style of equal or lesser value. (If the new flooring you select costs more, you simply pay the difference.)

If you walked into any other flooring store and asked them for a guarantee like this, they will probably laugh and tell you “no way!” So how can I offer such a powerful guarantee? I couldn’t unless I was absolutely confident in the quality of my products and service. I am confident, and you will be, too...I guarantee it!

Guarantee #2 Lifetime Installation Warranty

Buying flooring is not like buying any other piece of interior décor, such as a sofa or a lamp. Why? Because unlike other products, flooring is installed or “manufactured” in your home. This makes the installation critical. I offer a lifetime installation warranty at **YOUR STORE**. You NEVER have to worry about something going wrong with the installation. If it does, I’ll fix it FREE! And I’ll do it quickly.

Guarantee #3 Installer Professionalism Guarantee

YOUR STORE installers are neat, clean, well-groomed, well-spoken and professional. They are trained and certified. They are guests in your home, and they conduct themselves as such. They respect your home by using wall and corner guards, shoe covers and drop cloths. You’ll receive the highest-quality installation in the business. And after they’re finished, they will leave your home as neat and clean as when they arrived!

YOUR STORE INFO

Your Store Information

Installation Agreement

Type of flooring to be installed:

Product Details

Style and color code verified	y	n	na
Grout color code verified	y	n	na
Custom maintenance plan given to client	y	n	na
Product warranty covered & given to client	y	n	na
Installation warranty covered & given to client	y	n	na
Custom trim/edgings to be installed	y	n	na
Fabric Guard purchased	y	n	na
Non-standard labor explained	y	n	na
Client understands need for overage	y	n	na
Copy of sales receipt given to client	y	n	na

Installation Details

Installation preparation checklist covered with client	y	n	na
Client is aware that he/she is NOT to clean vinyl floor for 36 hrs. after installation	y	n	na
Direction/placement of seams determined	y	n	na
Direction of planking determined	y	n	na
Possibility of trim/baseboards requiring touchup covered	y	n	na
Possible requirement to plane doors covered	y	n	na
Appearance of seams covered	y	n	na
Client is aware that we can't guarantee elimination of squeaking in the floors	y	n	na
Appearance of joints and their reaction to humidity covered	y	n	na

_____ Client understands that it is impossible to know the condition of the sub floor before the installation, and that if extra floor prep is needed extra charges may apply.

Who does what...

Old flooring will be removed by...	Client_____	Store_____	na_____
Old flooring will be disposed by...	Client_____	Store_____	na_____
Furniture/appliances will be moved by...	Client_____	Store_____	na_____
Toilet will be removed/replaced by...	Client_____	Store_____	na_____

We want to earn your referrals

Client survey covered	y	n
Importance of referrals explained. Client is aware that our goal is to EARN referrals by providing exceptional service	y	n

Client signature

Floor consultant

Date

World Class Installation Quality Checklist

Your Store Information

Carpet

Cushion installed	y	n	na
Carpet installed	y	n	na
Carpet stretched to proper tension	y	n	na
Double check seams	y	n	na

Hard floor

Adhesive applied	y	n	na
Direction of planking correct	y	n	na
Grout sealer applied	y	n	na
Hard floor installed	y	n	na

Sub floor/concrete prep	y	n	na
Baseboard removed/installed	y	n	na
Removed Old flooring	y	n	na
Disposed of old flooring	y	n	na
Removed/re-hung doors	y	n	na
Custom trim/edging installed	y	n	na
Toilet removed/replaced	y	n	na
Furniture removed/replaced	y	n	na
Drop cloths used on non-work areas	y	n	na

Cleanup

Double check for tools, razors, etc.	y	n	na
Carpet vacuumed	y	n	na
Hard surface swept	y	n	na

Other _____

Client signature

Installer

Date

Client Feedback Form

your store's information

NAME: _____

As our way of thanking you for your honest feedback, if you fill out this form and return it in the stamped, return envelope provided, we will send you a \$5 gift certificate to Starbucks.

Please rate us on a scale of 1 to 5 on the following (5 being the best)

During the purchase, how well did our salesperson meet your expectations in the following areas:

- 1. Understanding your unique needs, and making recommendations based on those needs _____
- 2. The level of efficiency and clarity in getting your questions answered _____
- 3. Explained guarantees and warranties _____
- 4. Explained what to expect during the installation process _____
- 5. Overall satisfaction with service provided by your salesperson _____

Installation process

- 1. Professional appearance of the installer _____
- 2. Level of courtesy from the installer _____
- 3. Explained the installation process before beginning _____
- 4. Did the installer clean up after work was completed? _____
- 5. Did the installer do a “walk-through” with you after the job was completed? _____
- 6. Overall satisfaction with service provided by your installer _____

Overall experience with our store

- 7. The degree in which we met your expectations on time frames for the installation _____
- 8. Level of courtesy from our in-store staff _____
- 9. The cost we quoted you vs. the cost you paid _____
- 10. Quality of floor covering product _____
- 11. Clean, attractive showroom _____
- 12. Overall experience of working with us _____

It's your feedback that can help our store improve. Please express your honest feelings to the following:

- 1. Is there anything that was important to you that we did not address?

- 2. What suggestions do you have for improving the level of our service?

- 3. Is there another service that we can provide you with at this time or in the future?

- 4. Would you recommend our store to a friend or relative? Yes _____ No _____

Personal Testimonial

We are looking for ways to expand our business, and we have a way you can help. If there was something you especially liked about the service you received, it would help us very much to have a testimonial from you that we could use in our advertising. (Newsletters, postcards, etc.)

Here are some ideas to get you started on your testimonial...

1. **How your new flooring beautified your home; made your house feel like a “home,” etc.**
2. **What your friends and relatives said when they saw your new flooring.**
3. **Installation professionalism** (were you impressed with the appearance of your installer, his professionalism, job cleanup, attention to detail, etc.?)
4. **Client Service** (Did we go the extra mile for you? How? Was our staff courteous? Were you made to feel welcome when you visited our showroom?)
5. **Your worst experience with floor covering** (How did **YOUR STORE** do better?)
6. **Do-it-yourself/big box stores** (How did working with **YOUR STORE** compare with a previous do-it-yourself job? Or with working with a big box store?)
7. **Education** (How our client education helped you make the right selection. Did you like the free “Design Audit”? Was your salesperson attentive to your needs?)

A testimonial from you will go a long way towards helping future clients feel good about working with **YOUR STORE**.

Sincerely,
YOUR NAME

Personal Testimonial _____

How You Can Give Your Friends And Relatives A Free Gift And... Get A Night Out At The Movies...My Treat!!!

Dear Friend and Client,

You may not know about the fabulous referral reward program that we offer to our clients. It works like this:

As you probably know, advertising is very expensive. Instead of paying the newspaper or other place to advertise, I'd rather reward you. So I've assembled my **Referral Rewards Program**. Every time you refer someone who becomes a client, I will send you a gift certificate for two passes to the **Movies-8 Cinema**. And Hey! What's a movie without popcorn? The gift certificate will also cover a big box of hot, buttered popcorn and sodas!

A \$100 Gift From You To Your Friends

I will send every friend or relative that you refer a FREE **YOUR STORE** gift certificate for \$100 in your name!

Do Your Friends A Huge Favor!

Many of my clients came to me after having a bad experience with a floor covering company. You will be doing your friends a gigantic favor by referring them to a company they can trust!

What To Do Right Now

It's simple. Just fill in the blanks on the back of this sheet for each friend, neighbor, relative, or acquaintance you want to refer.

Bonus Reward!!

If you fill out all 10 name, address, and phone spaces and turn it in today, you will receive \$25.00 worth of **YOUR STORE** Bucks! You can use these just like cash next time you purchase spotter, floor mats or any other products from us!

Look at this—

Special Thanks To All Who Referred Us.

Karen McConnell
John & Cathy O'Shea
Lucy Prall
Dena Mannee
Debbie Clay
Ted Edmunds
Pat Griffiths
Lisa Olivera
Karisa Hawes
Judy Tenney
Kelly Sabo
Sandy Berg
Mike Palmquist
Bobbie Cooper
Fran Rex
Sharon Davis
Anne Fitch
Mary Moore
Tara Safdar
Tammy Houston
Kim Ruccione
Barbara Douyon
Kari Ball
Ruth Bishop
Gayle Smith
Jennifer Smith
Rita Buttacavoli
Melanie Deal
Jeff & Kim Miller
Marie Sprague
Randy & Cathy Meyer
Tina Davis

Referral Form On Reverse Side

YOUR STORE INFO

Your Name _____ Your Phone _____

Your Address _____ City, Zip _____

**Enter The Names Of Your Friends On The Lines Below
(You may attach more sheets if necessary)**

Name _____

Name _____

Address _____

Address _____

City, Zip _____ Phone _____

City, Zip _____ Phone _____

Name _____

Name _____

Address _____

Address _____

City, Zip _____ Phone _____

City, Zip _____ Phone _____

Name _____

Name _____

Address _____

Address _____

City, Zip _____ Phone _____

City, Zip _____ Phone _____

Name _____

Name _____

Address _____

Address _____

City, Zip _____ Phone _____

City, Zip _____ Phone _____

Name _____

Name _____

Address _____

Address _____

City, Zip _____ Phone _____

City, Zip _____ Phone _____

If you really liked our service, I would like to hear about it! (I also want to know if there is something you were unhappy with!) On the lines below, write 1 or 2 things that you especially liked about **YOUR STORE**.

NO, please do not use my name in your promotional material.



Enclosed Is A \$100 Gift Certificate From **CLIENT NAME**

YOUR NAME

Owner of **YOUR STORE**

Dear **REFERRAL NAME**,

Hi! My name is **YOUR NAME**, owner of **YOUR STORE**. I specialize in knocking the socks off my clients with World Class Floor Covering Service!

Recently we installed new floors for **CLIENT NAME**. What a difference! The floors look amazing!

In Fact...**CLIENT NAME** was so impressed with our World Class Installation service, and the beautiful finished floors, that they wanted to introduce you to us by giving you a free gift!

Congratulations On Your Free Gift!

Enclosed is a **YOUR STORE** gift certificate for \$100. This gift certificate is good for any purchase over \$2,500. If your purchase is from \$1,000- \$2,500, you'll get dinner for two at **RESTAURANT**. Under \$1,000 and you'll get a gift certificate to Starbucks and a FREE spotting kit. How many times have you gotten mustard, or pet urine, or wine on your carpets and not known what to do about it? Or made a bigger mess by using those "grocery store" spotters? Well, your FREE kit comes with four different spotters and complete instructions on how to get out even super-tough spots. It's great for auto upholstery, too!

*But you must hurry! This FREE gift certificate for \$100 is only good until 5:00 P.M. on Friday, **DATE 30-DAYS AWAY**.* Come by the store right away so you won't miss out on this rare opportunity.

3 More Reasons To Choose **YOUR STORE**

#1. You are protected by my "No Regrets Guarantee" *If you don't like it, I'll replace it...FREE!*

Here's how the "No Regrets Guarantee" works: if at any time during the first 30 days after installation you decide you don't like your new flooring for whatever reason, just let me know. I'll replace the materials free of charge. (With an outrageously good guarantee like this, I can't include the cost of installation, so you'll have to cover that.)

I offer this amazing guarantee because you're going to have your new floor for a long, long time, and I don't want you to have to live with a choice you'll regret. I want you to be head-over-heels thrilled with your selection. So if you are unhappy with the flooring, I'll replace it one time free of charge with another style of equal or lesser value. (If the new flooring you select costs

more, you simply pay the difference.)

If you walked into any other flooring store and asked them for a guarantee like this, they will probably laugh and tell you “no way!” So how can I offer such a powerful guarantee? I couldn’t unless I was absolutely confident in the quality of my products and service. I am confident, and you will be, too...I guarantee it!

#2. I Make The Entire Process Fun, Easy and “Headache” Free!

Unfortunately we’ve all heard the nightmare stories about buying flooring. Well, to turn the nightmare into a “dream come true,” I have developed a World Class Installation System. I specialize in knocking the socks off my clients with the most elegant, gorgeous, beautiful flooring they have ever had, **AND** making the entire process fun and “Headache Free”! Here’s what you’ll enjoy during my World Class Installation System:

Free Design Audit—This is a diagnostic tool that allows my expert floor consultants help you choose the right floor for your decorating taste and lifestyle. They’ll walk you through a series of questions that will help narrow down the thousands of options to the two or three that exactly match your unique situation. They’ll also give you a written, customized “maintenance” plan with their professional recommendations for getting the longest life and beauty out of your floor.

You’re kept updated throughout the process—From the time you select the product until after it’s installed, you will be contacted no fewer than six times by phone and by mail. You’ll never have to wonder what’s happening with your flooring.

Installer professionalism guarantee—**YOUR STORE** installers are neat, clean, well-groomed, well-spoken and professional. They are trained and certified. They are guests in your home, and they conduct themselves as such. They respect your home by using shoe covers and drop cloths. You’ll receive the highest-quality installation in the business. And after they’re finished, they will leave your home as neat and clean as when they arrived!

#3 Lifetime Installation Warranty

Buying flooring is not like buying any other piece of interior décor, such as a sofa or a lamp. Why? Because unlike other products, flooring is installed or “manufactured” in your home. This makes the installation critical. I offer a lifetime installation warranty at **YOUR STORE**. You **NEVER** have to worry about something going wrong with the installation. If it does, I’ll fix it **FREE!** And I’ll do it quickly.

HURRY! Bring the enclosed gift certificate to my store by DEADLINE!

I’m looking forward to meeting you!

At Your Service,

YOUR NAME/TITLE

P.S. Enclosed your **FREE YOUR STORE** gift certificate for \$100. But you must bring it by **YOUR STORE** by **DEADLINE!**

P.P.S. You are protected by our exclusive “No Regrets Guarantee.” If you decide during the first 30 days that you are unhappy with the product you selected, I’ll replace it **FREE!**