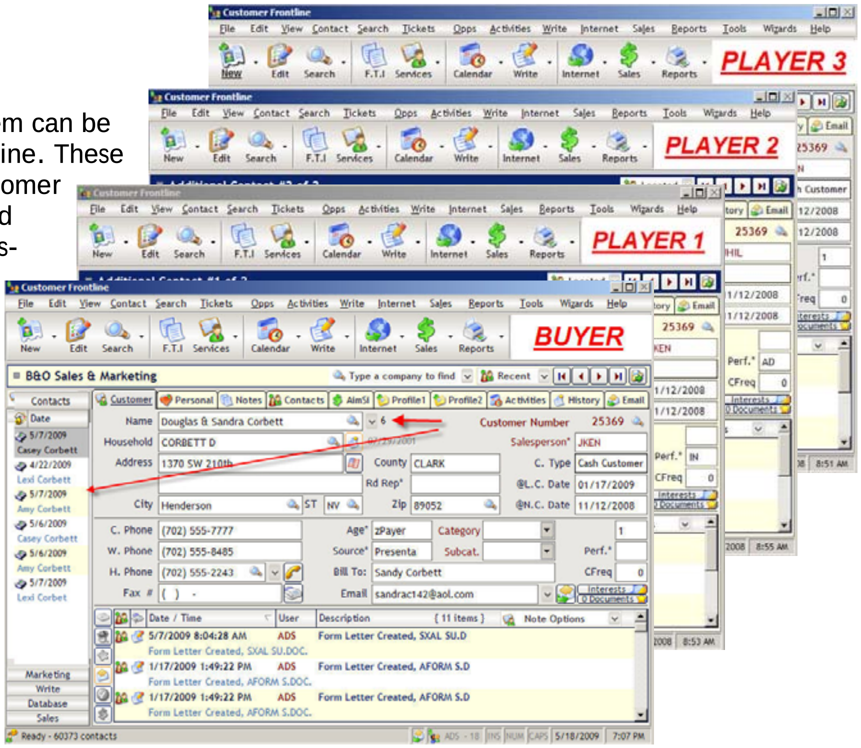
Customer Follow Up Selling System

Presentations • First Time Sales • Add Ons • Step Ups

A Guide For Combo Gear Sales Professionals

INTRODUCTION



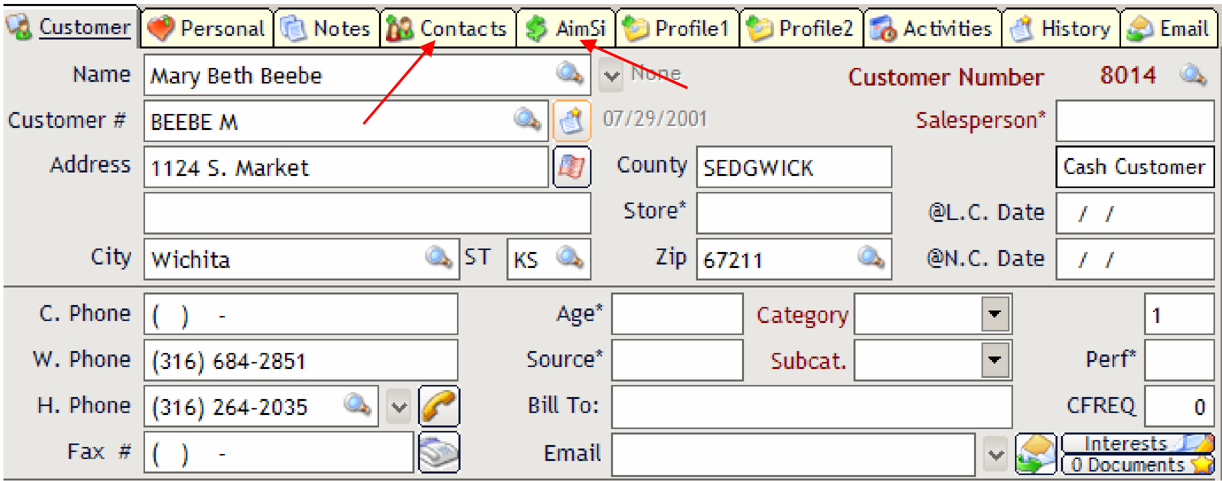
All of the customer records in your AIMsi system can be accessed and viewed through Customer Frontline. These customer records are used to organize a “customer household” in Customer Frontline. A household starts from the customer record already in Customer Frontline - it is considered to be the Buyer, the person who pays for instruments that are played by the musicians in the household. The AIMsi customer number, basic information and sales transaction histories are all displayed on the different tabs in this Customer Frontline record. “Player” records are added to a buyer record. An added player record shares the same AIMsi account number with the buyer, it does not create a new AIMsi customer record. However, Customer Frontline considers each player record to be a unique customer. As a sales person you can use player records to document your selling activities with each customer and to schedule follow up Activities in order to cultivate future sales. As this guide will show, Customer Frontline can be used to replace hand written notes and reminders about your customer interactions, follow up appointments and selling initiatives.

1) **The Buyers**: identify the person who buys, rents and pays for instruments and services from your store that are purchased for the players in the household. The Aimsi account number, first and last name, address, phone, email, etc. and all accounting transaction history including purchases, rentals, extended warranties, etc. are part of the Buyer record.

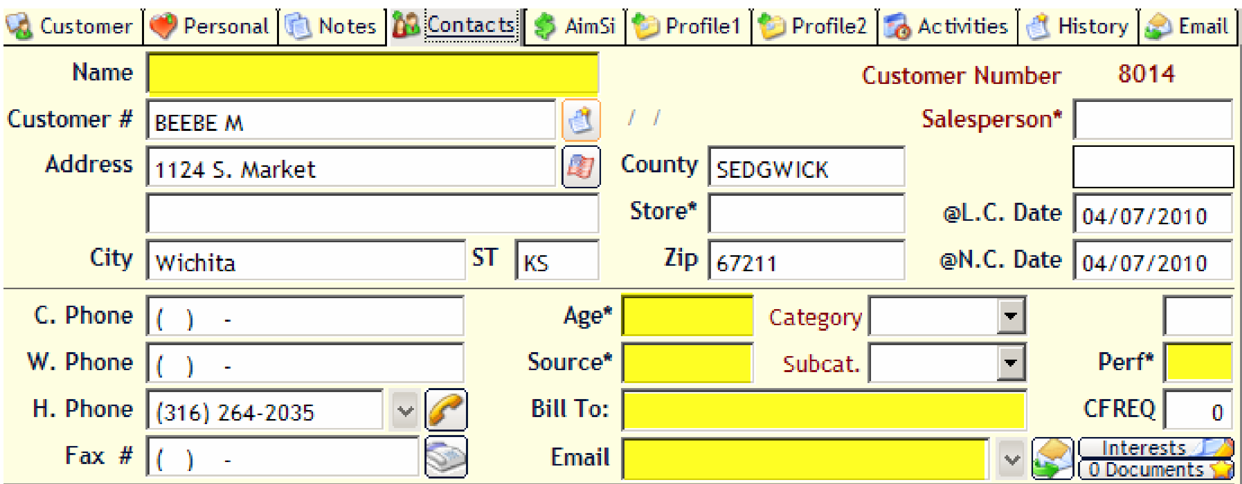
2) **The Players**: added by a sales person to identify and profile the musical attributes of an individual musician within a household including: first and last name, what they play, and your selling strategies to advance their musical achievements. You will also use the Player to record future follow up appointments and objectives.

As you will see, a Customer Frontline household provides you with the sales and marketing information needed to accurately find and solicit certain qualified buyers with targeted offers to buy items or services that match the musical needs of the players in their households.

Buyer Record for Mary Beth Beebe



The basic customer information already entered in the AIMsi system is displayed on the Customer Frontline customer screen as seen above. The sales transaction history for this customer can be viewed on the AIMsi tab, as noted by a red arrow. The first Player record is added by clicking the CONTACTS tab as noted by the other red arrow above.

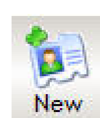


Adding a Player's record to the Buyer's record – Organizing a Household

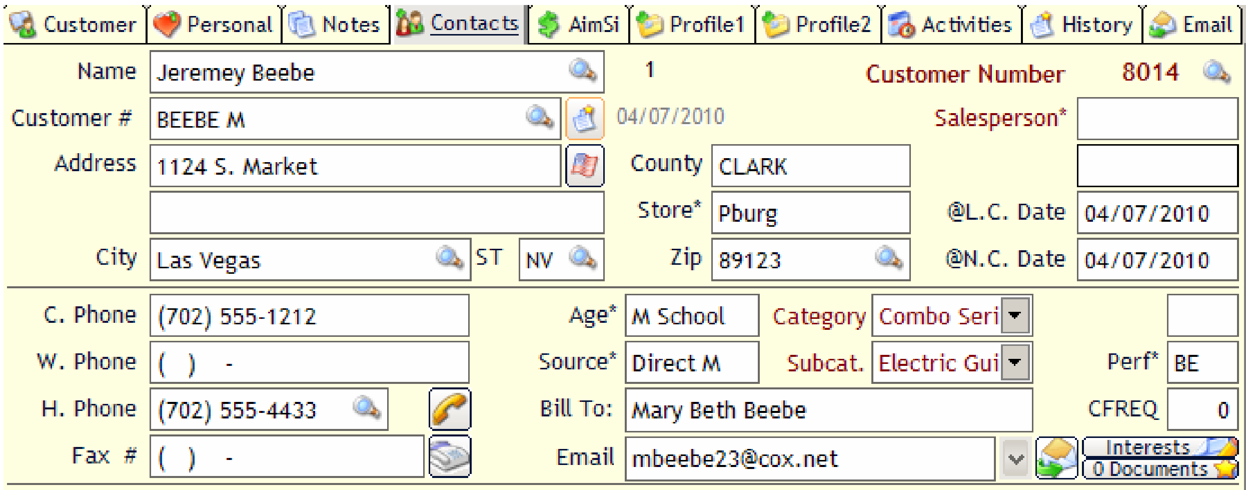
Adding Jeremy as a Player in the Bebee household: click on the CONTACTS tab. Basic information from the Buyer's record will auto-populate related fields when a new player record is added. Fill in the fields highlighted in yellow. Use drop down menus in fields marked (*****) or a drop down arrow (see pages 5 and 6).

1) Enter the first and last name of the player.
2) Enter the first and last name of the buyer in the household in the "Bill To" field. Enter the name as you want it to appear in an email, brochure, letter, label, etc.
2) Enter the buyer's email address and other phone numbers that you will need for future follow up contacts.
3) Populate the remaining highlighted fields as described on pages 5 and 6. Click the "Save" button in the upper right corner of the screen.
4) Click on the PERSONAL tab, click Edit and click the cursor in the Buyer F.Name field. Enter the "Bill To" person's first name only. Click and select the relationship of this Player to the Buyer; a school can also be selected.
5) Click "Save". The basic information about your Player is documented, see top of page 3.

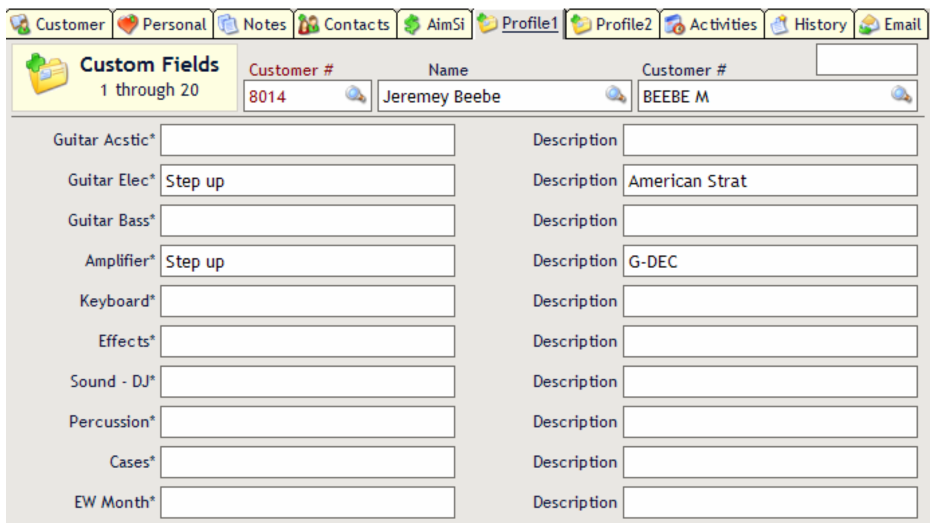
Note: once the first player record is added to a household all additional player records are initiated by clicking the "New" icon in the upper tool bar of an existing player record.



Player Record for Jeremy Beebe



The third tab of a Player's record is labeled PROFILE 1. This Profile tab is used to outline a marketing strategy to make future sales based on destination instruments identified for this Player. For example, two fields have entries that describe two destination items for Jeremy: a step up guitar and a step up amplifier. The salesperson has identified these items as the result of interactions with Jeremy and most likely Mary Beth. These entries can be updated as the salesperson advances the player to other instruments and accessories.

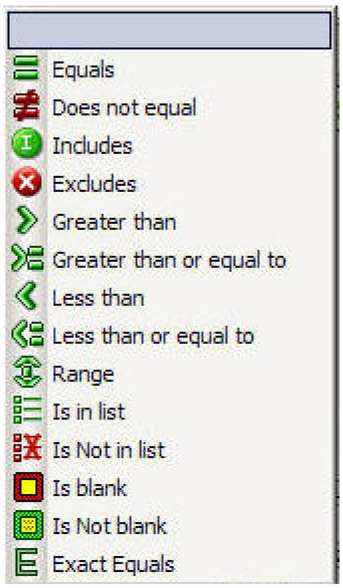


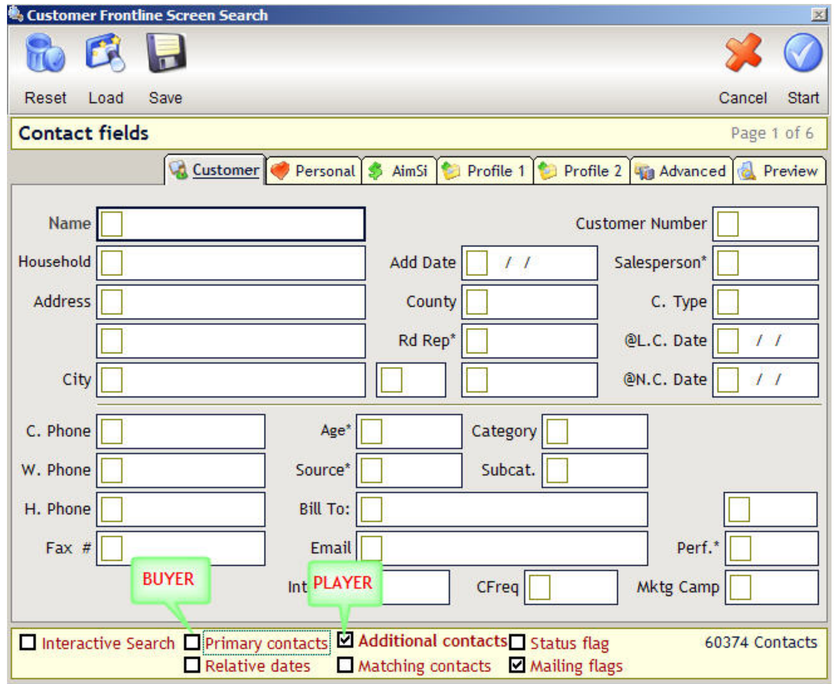
Every data field in Buyer and Player records are target "qualifiers" to be used as a resource to find customers in your database for any variety of reasons. The accuracy and timeliness of data field entries determine the sales and marketing value of your database. The completed customer record for Jeremy Beebe will be used as an example of how Customer Frontline can find qualified buyers as a means to organize targeted sales and marketing programs.

As shown by the screens above, Jeremy is a beginner guitar player. Mary Beth Beebe, his mother, pays the bills. With the information entered into Jeremy's customer record he and his mother would be included in a Customer Frontline data search when it is time to promote a clinic on guitars, a sale on amplifiers, etc. Customer Frontline provides a variety of database navigation tools and other utilities for you to find Buyers based on any combination of musical qualifications associated with the Players in their household, as explained on the next page.

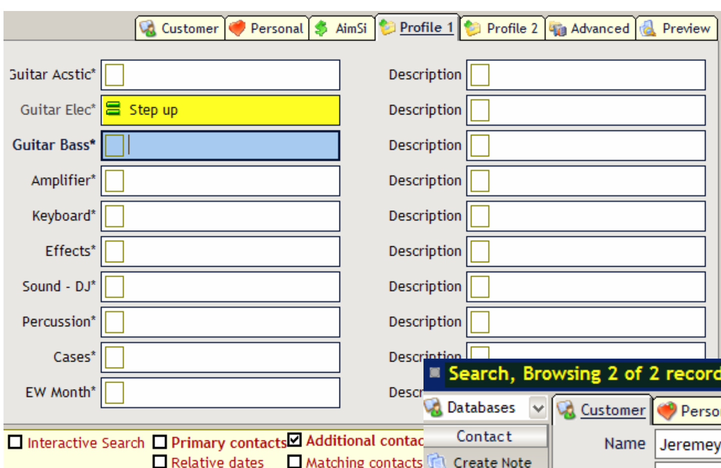
Finding Buyers and Players in Customer Frontline

Finding customers is done with an intuitive "screen search" utility in Customer Frontline. Click "Screen Search" in the left toolbar of any customer record. A blank screen, as shown below on the right, will appear. The data fields on all tabs of a blank customer record are displayed with a command box on the left. The command menu list appears when a command box is clicked. The selected command dictates how the Customer Frontline search engine will treat the data in the selected field. Screen searches can be organized by any combination of fields. A data field is activated for a search when a command from the drop down menu, as shown below, is turned on and a selection is entered into the blank data field.

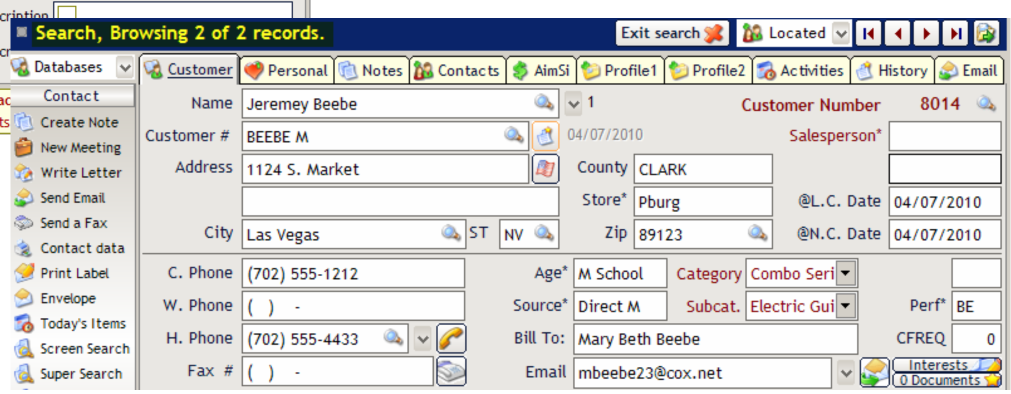




Notice the two green call out signs at the bottom of the search screen above. One or both of these options must be turned on. Customer Frontline will search and find Buyers when "Primary Contacts" is turned on. Players are found when the "Additional Contacts" selection is turned on. Most searches are done on "Additional Contacts".



The sample screen search on the left will find Players who have been identified by the sales staff as destined to play a step-up guitar. As seen below, two players were found (including Jeremy) by the "step-up guitar" qualification. A marketing campaign by way of emails, letters, phone calls, etc. can be initiated to the Buyers in these households based on the musical qualifications of their Players.



Menu List Items & Definitions - Combo Customers

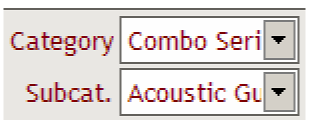
How to select from menu lists in data fields with an asterisk (*)

An asterisk (*) at the end of a data field name indicates that a menu list is assigned to it from which a selection is made to populate the field. A field without an asterisk will accommodate data that is key entered by you up to its space capacity. The customer record must be in the edit mode to add or change data field information. To display a menu list: 1. point and left click the mouse in the destination field; 2. right click the mouse, the list appears; 3. left click a menu item, it will install to the field, the cursor will move to another field.

Notice that the Category and Subcategory fields have down arrows rather than an asterisk, see below. Left click the down arrow of the Category field to display its menu list. Left click a menu item. Left click the down arrow of the Subcategory field and left click a menu item. These two fields must be done in this sequence. A Category item must be selected first. This selection determines the list of menu items that are qualified for entry in the Subcategory field.

Click the "Save" button in the upper right corner of the customer record to save all field entries. Field entries can be updated as needed in the future by clicking the "Edit" button in the upper left toolbar of the customer record. The "Save" button must be activated when data entries and changes are completed on an *open* customer record screen before moving to another tab or customer record.

The Category and Subcategory fields are used as a general classification to identify the principal instrument of the Player. Populate these two fields with the intention that they will be used in the future to find those Players who are qualified to receive instrument based marketing and sales promotion announcements. For example, Customer Frontline would find Players in your database with the field entries as displayed on the left so that you can alert them about a sale for acoustic guitar pick ups and other related items.



OTHER CUSTOMER FRONTLINE DATA FIELDS WITH ASSIGNED MENU LISTS

Age*

Select player's age category

Item	Description
Adult	The customer who BUYS and PLAYS the instruments purchased
E School	Elementary school
H School	High school
M School	Middle school
P School	Pre-school
z Buyer	The customer who BUYS but doesn't PLAY the instruments purchased

Source*

How did you find out about our store?

Item	Description
Billboard	Outside billboard display
D Mail	Direct mail announcement
Internet	Found about the company through internet search like Google
Newspaper	Display advertising
Radio	Radio commercial
Referral	Another person recommended the company to the customer (teacher, tech, customer)
Road Rep	Customer was referred to the store by one of the company's road reps
Store Cus	Has an established purchase history with the company
TV	Television commercial
Unknown	Don't forget to ask!
Website	Customer landed on the company's website

Perf* (Performance)

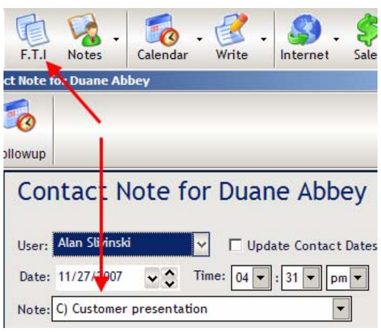
Select player's musical performance level

Item	Description
AD	Advanced
BE	Beginner
IN	Intermediate
PR	Professional (performs in public)
TE	Teacher
UN	Unknown

Purchase Qualification by Instrument Category (Profile 1 Tab)

Select player's qualification

Item	Description
Owner	Owns a high end model, not likely to trade up or purchase another
Prospect	Has an interest to buy, does not currently own this type of instrument
Repeat	Owns an instrument in this category, likely to buy another of similar quality
Step up	Player aspires to own a better quality model, received a presentation



THE FULL TIME INITIATIVE

The Customer Frontline notepad utility is designed to help you keep track of *what* is discussed with a customer, *how* to follow up and *when* to make the next contact. See guide: Next Contact for more details. The list below displays the contact headers and definitions used to document and describe the content of your most recent contact with a customer.

1. Click the “F.T.I.” button in the upper toolbar of the customer record. Click the down arrow to the right of the Note type field.
2. Select a contact type that describes the nature of your contact with the customer.
3. Click the mouse in the open field to enter notes about what was discussed, etc., and what should be done in the future to close the next sale.
4. Verify the “Next Contact Date” and save the note.

Full Time Initiative (F.T.I.) Notepad Entries

Contact Type & Description

A) 1st sale made

The first serial numbered item sold by me to this customer

B) Repeat sale made

A subsequent serial number item sold by me to this same customer

C) Customer presentation

Describe the instrument presentation made to the customer: model, price, etc.

D) New customer added

A first time shopper in this department, I will follow up to make sales

E) Phone call, outgoing

TT: Talked to… LM: Left message… include brief summary

F) Phone call, incoming

TT: Talked to… include brief summary

G) Received email, mail, fax

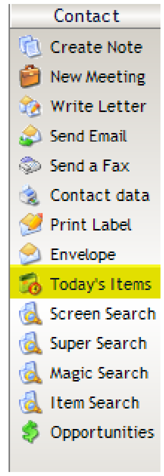
Describe content of what was sent to the customer

G) Received email, mail, fax

Describe content of what was received from the customer

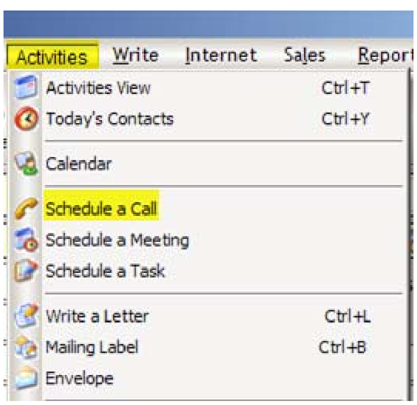
Documenting and Scheduling Selling Activities in Customer Frontline

Customer Frontline posts completed and assigned customer follow up Activities in the “Today’s Items” list on the day that the assignee is scheduled to follow up with a customer.

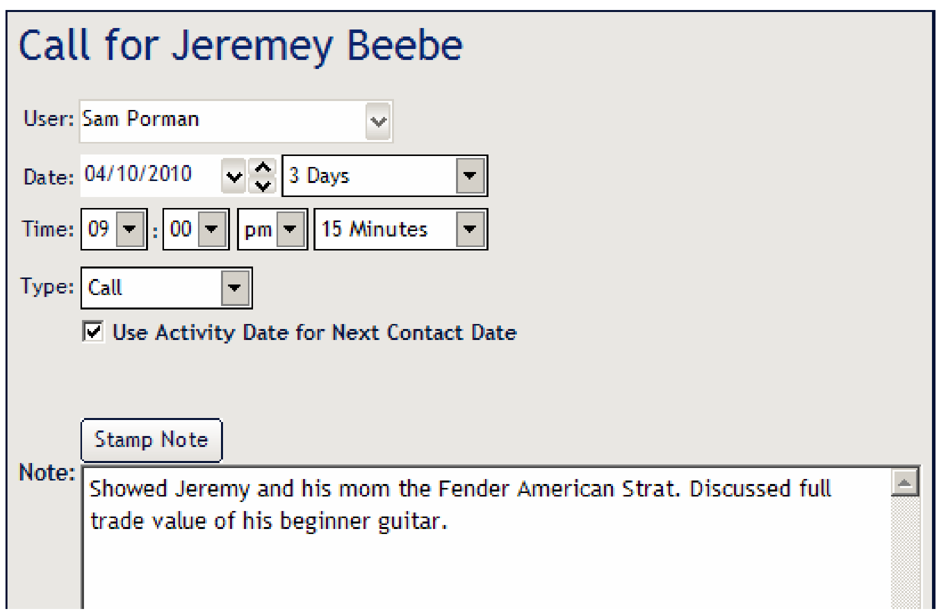


The Customer Frontline Activities scheduler is organized so that a user can assign a follow up contact for a customer to themselves, or assign a scheduled follow up contact for a customer to another person in the company. For example, a sales-person can schedule a follow up call to be made to a customer on a specific date. The assignment will be listed in the note-pad area of the customer record. The customer record will be displayed on the assigned date when the “Today’s Items” icon, located in the left toolbar, is clicked. This reminder will be displayed for the assignee, not the assignor. In other words, a follow up “Activity” is scheduled by an assignor and implemented by an assignee. This can be the same individual, or two different people. An Activity is scheduled as follows:

Click the “Activities” utility in the top toolbar, click “Schedule a Call”.



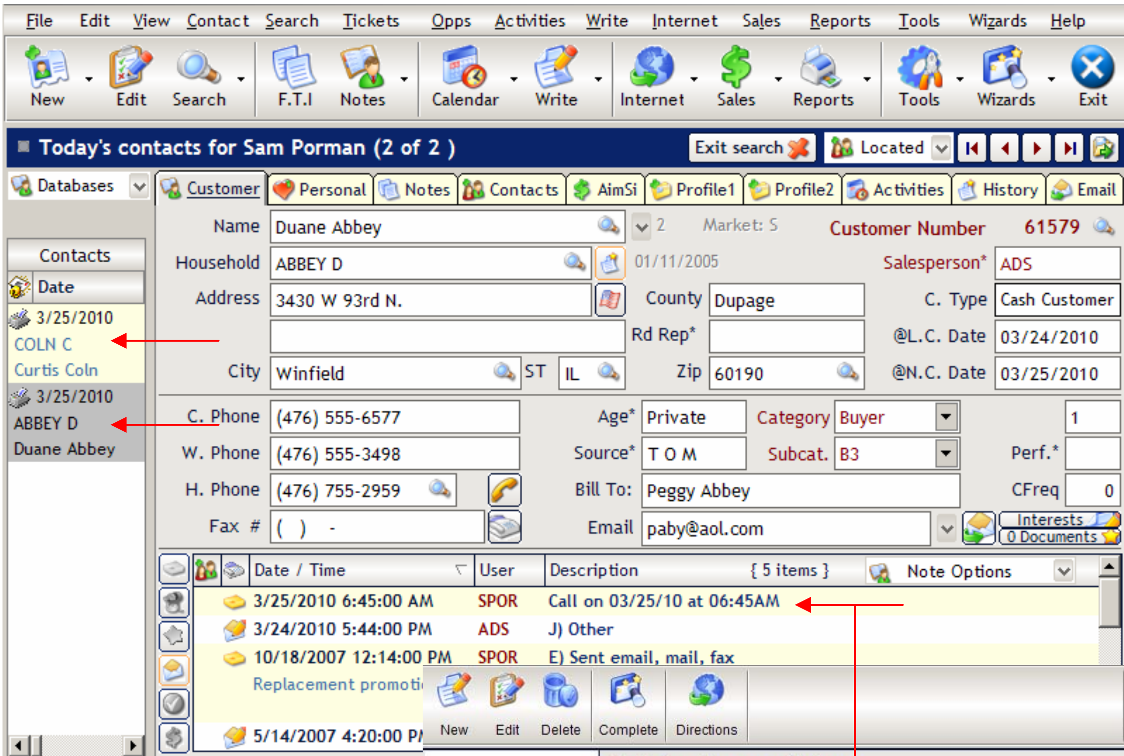
This dialog box below will appear.



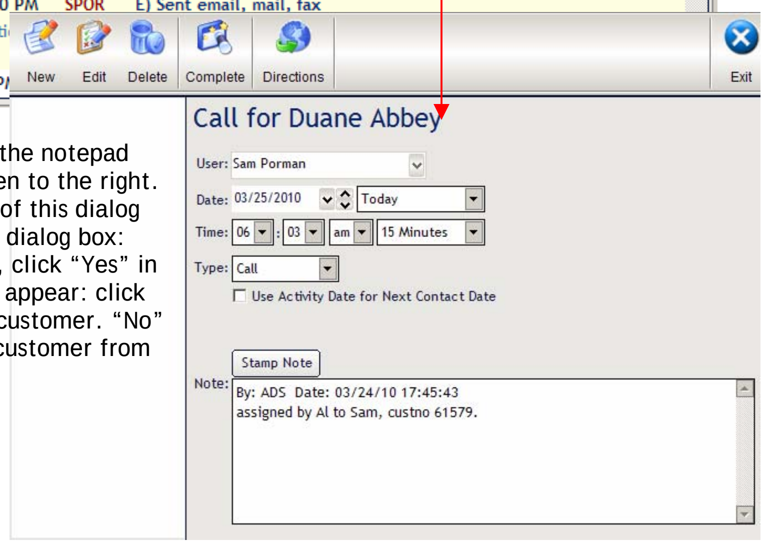
Notice that the assignee is Sam (User). He has posted a call for customer Jeremy Bebee to his follow up schedule for 04/10/10. Consequently, when Sam logs in to Customer Frontline on 04/10/10 and clicks the “Today’s Items” Jeremy will be included in his follow up “to do list” for that day.

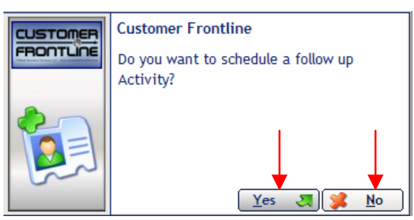
Scheduled activities are displayed in the customer record notepad area, as seen on the next page.

As the sample shows below, Customer Frontline is listing two customers previously scheduled for follow up contacts on 03/25/10. This list and the customer records were organized into a Customer Frontline Screen Search after user Sam clicked the Today's Items tab.



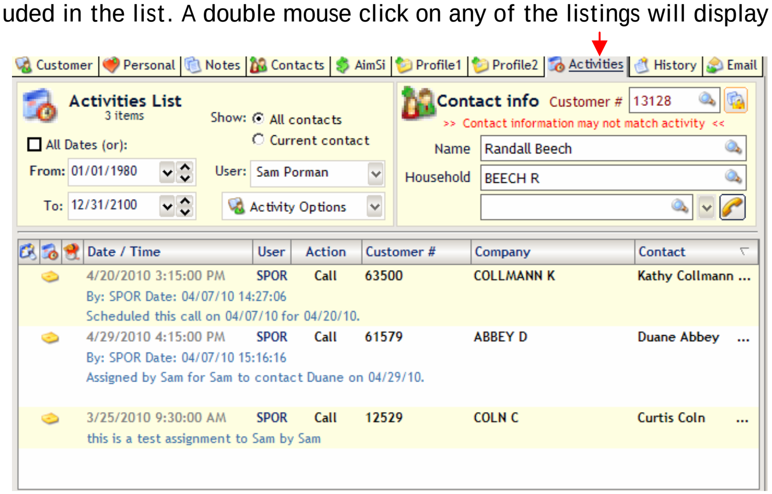
A double mouse click on the Activity header in the notepad will display the actual Activity dialog box as seen to the right. Note details are displayed in the lower portion of this dialog box. An Activity can be completed while in this dialog box: click the Complete button in the upper toolbar, click "Yes" in the first options box, a second Options box will appear: click Yes to schedule a new future contact with the customer. "No" will close the current Activity and remove the customer from your future contact schedule.





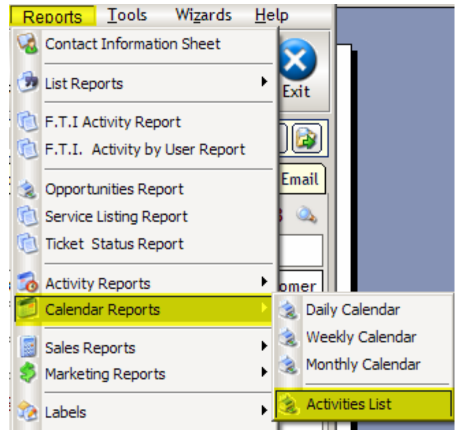
When "Yes" is selected a new Activity dialog box appears to assign a new follow up Activity for this customer, either to yourself or to another person in your company.

A listing of scheduled Activities can be displayed by clicking the "Activities" tab on a customer record.. This list is populated according to the content options that are selected: date parameter, user, all or current contact. Completed or deleted Activities are not included in the list. A double mouse click on any of the listings will display that Activity dialog box.

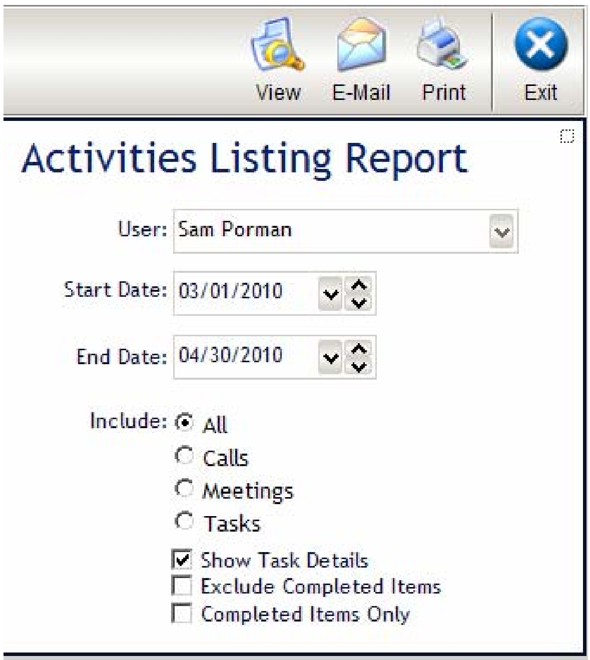


Activities Report

A management summary report of Activities can be viewed / printed as follows:
Click Reports | Calendar Reports | Activities List



The dialog box shown below will be displayed. Select a User, date parameter, and category of Activities to be included in the report.



The report sample below is generated from the selected options in the report dialog box above. Note that this report includes "completed" Activities to provide a more comprehensive summary of customer follow up activities by user Sam Porman.

Activities Detail Report
All activities for Sam Porman

Date	Time	Activity	Cust #	Company	Customer name	Phone
03/25/2010	06:45am	Call	61579	Duane Abbey	Duane Abbey	(476) 755-2959
Notes: By: ADS Date: 03/24/10 17:45:43 assigned by Al to Sam, custno 61579. { Completed on 04/07/2010 at 15:09:58 by Sam Porman }						
03/25/2010	09:30am	Call	12529	Curtis Coln	Curtis Coln	(476) 755-2959
Notes: this is a test assignment to Sam by Sam						
04/20/2010	03:15pm	Call	63500	Kathy Collmann	Kathy Collmann	(476) 755-2959
Notes: By: SPOR Date: 04/07/10 14:27:06 Scheduled this call on 04/07/10 for 04/20/10.						
04/29/2010	04:15pm	Call	61579	Duane Abbey	Duane Abbey	(476) 755-2959
Notes: By: SPOR Date: 04/07/10 15:16:16 Assigned by Sam for Sam to contact Duane on 04/29/10.						