Piano Customer Selling System

Qualification • Follow Up • Closing • Referrals • Trade Ups

A Guide For Piano Sales Professionals

INTRODUCTION

Sales professionals use the Customer Frontline™ selling system to close more piano sales three ways…

Documented Customer Qualifications

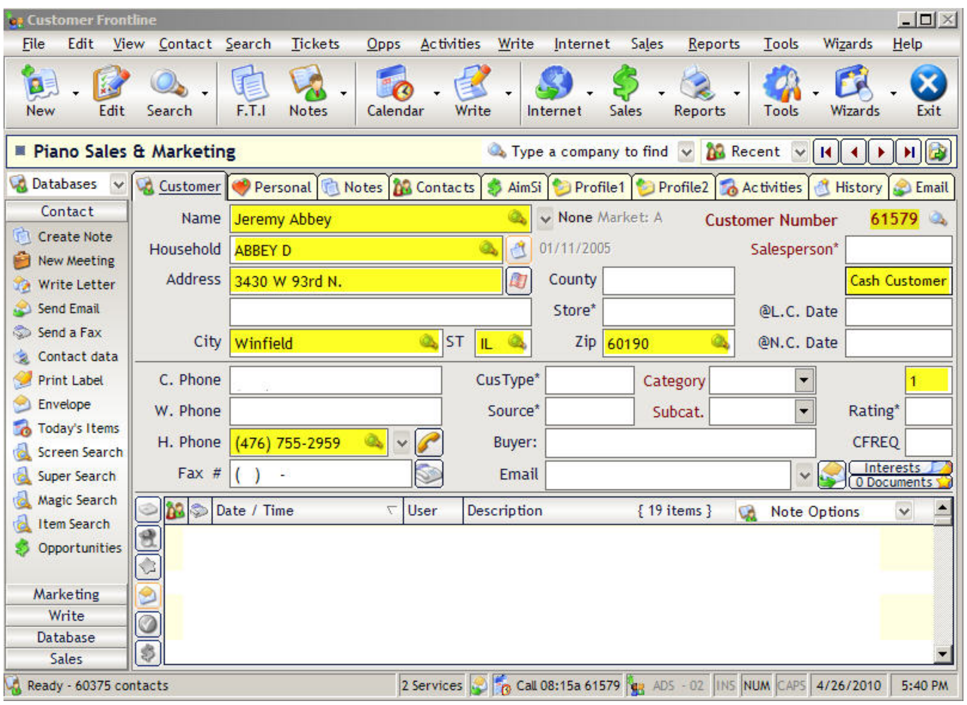
Automated Prospect Follow Up & Closing Strategies

Referral Customer Network Database

This guide will help you implement the Customer Frontline system into your daily selling activities. People who follow this guide close more sales and build stronger referral networks. You will find selling tips, shared by other piano sales professionals, notated with "**$**" throughout this guide.

Starting With The AIMsi™ Customer Record

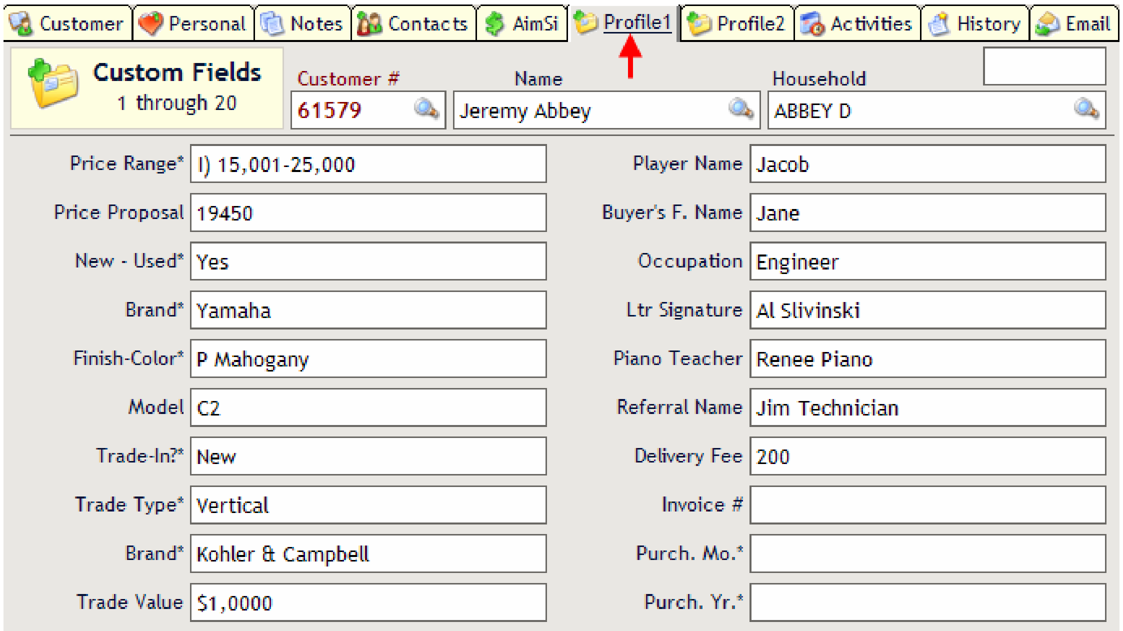
In many cases the shopper who visits the Piano Department to buy a piano might already exist in your AIMsi system if a pervious purchase has been made from your company. A piano shopper who fits this qualification will have a partial record in Customer Frontline, as illustrated below.



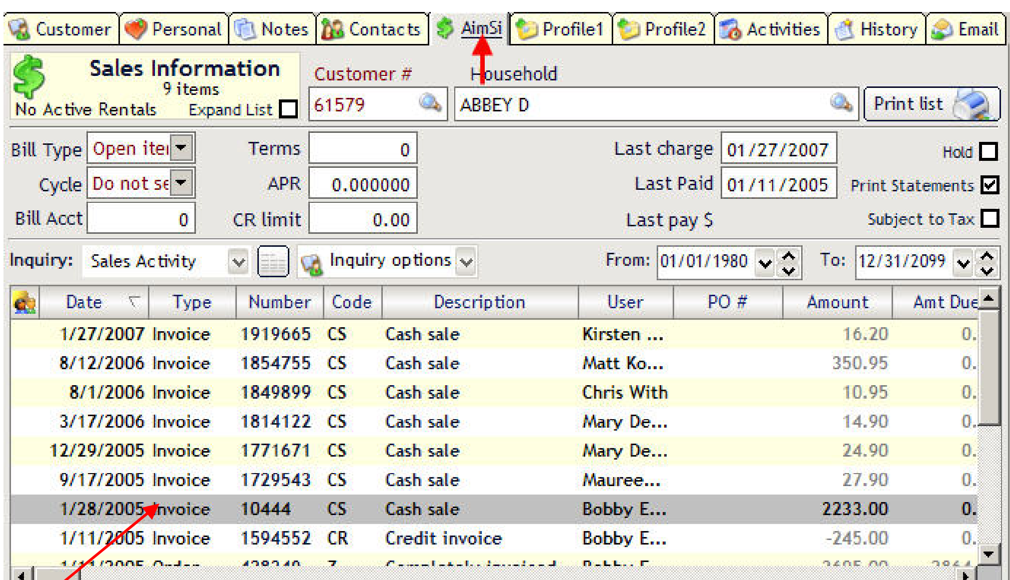
The information fields highlighted in yellow display the customer information already entered into the AIMsi system. These data fields should remain as they are. You will populate the blank fields in this screen along with additional fields on the Profile 1 screen in order to document the qualifications, conditions and follow up customer contact strategies needed to close a piano sale with this customer.

Two Additional Customer Screens

1. Each customer record in Customer Frontline has two additional screens that you will use to plan and follow up with piano customers. The Profile 1 tab is shown below, it is organized to identify the destination piano the shopper is most qualified to buy. These data fields serve as part of the qualification outline to help organize customers by certain shopping attributes. As shown in the sample below, the fields on the Profile 1 tab display a quick review of this customer's qualifications to buy a piano.

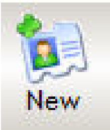


2. The AIMsi tab in Customer Frontline provides a list of a customer's transaction history, as shown below. This resource can help provide you with background information about a customer's buying habits, instruments played by other musicians in the household, etc. If the customer previously purchased a piano you will find it in the transaction history. Double click the line item to view the invoice. This information can be used to accurately calculate the value of a pending trade in.



A double mouse click will display the invoice for this previous piano purchase.

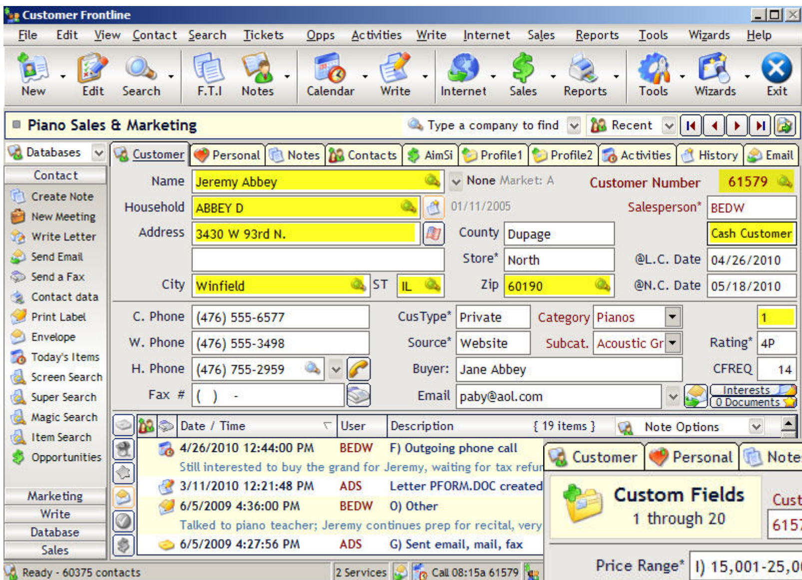
Adding a New Customer Record in Customer Frontline



There are two ways to add a new customer into the database: through AIMsi or Customer Frontline. Ask your system administrator for advice on which method to use. In either case, when a customer record is added in one program it is simultaneously added in the other with the same customer account number. A new customer is added through the normal procedures in AIMsi. Notice the account number AIMsi assigns to the new record. You will use this number to locate the same record in Customer Frontline as explained on page 9. A new customer record is started in Customer Frontline by clicking the "New" icon in the upper left toolbar of the customer screen.

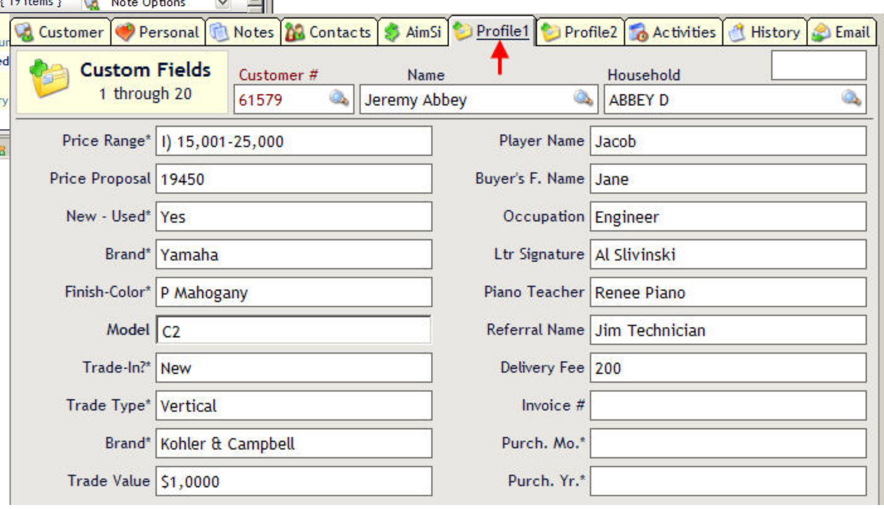
Completing a Customer Qualification Record

The two screens below show the original customer record from page 1. You will notice that the blank information fields have been populated by salesperson BEDW to document the customer's qualifications to buy a piano.



$: A piano sale cannot be closed before it is first opened. A sale is opened by qualifying the customer with conversation that includes questions using seven magic words: who, what, why, when, where and how.

Populated data fields in Customer Frontline indicate that the sales person did a comprehensive customer qualification. More piano sales are closed with Customer Frontline: "The more a sale can be opened the more likely it can be closed!"



$: Piano customers fall into three categories:
1. **Prospects** - shopping but haven't purchased.
2. **Owners** - shopped and purchased from you.
3. **Referrals** - people who tell others to buy from you.

Every completed data field in a customer record becomes a target "qualifier" to track customers in your database who are qualified to buy. The accuracy and timeliness of data field entries determine the sales and marketing value of your customer database. As shown above, the customer record for piano player Jacob Abbey provides a complete outline of who the player is, who will pay for the piano and who could influence the buying decision. The "destination" piano is identified with its quoted price, model and finish. And a trade-in is described and evaluated.

According to this customer record, the Abbey household has a serious piano player: Jacob. They are qualified prospects to purchase a grand piano. By using the database navigation tools in Customer Frontline you will have the tools to find piano prospects based on any combination of buying qualifications assigned to them in the customer record. The Abbey customer record would be included when Customer Frontline is told to "find all of my best grand piano prospects". See page 9 for instructions to use the customer search procedure.

Menu List Items & Definitions Assigned to Data Fields

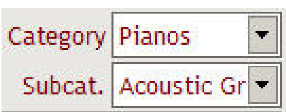
How to select from menu lists in data fields with an asterisk (*)

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.

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.

$: selecting from a menu list makes data field entries and changes both fast and accurate when a database search is launched to find your qualified buyers. Fields with an asterisk require an entry selected from the assigned menu list.

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 is selected first. The Category selection determines the list of menu items that are qualified for entry in the Subcategory field.



The Category and Subcategory fields are used as a general classification to identify the destination piano to be purchased. Populate these two fields with the intention that they will be used in the future to find those customers who are qualified to receive category based marketing and sales promotion announcements. For example, Customer Frontline will find customers in your database with the field entries as displayed on the left so that you can alert them about a limited time sale on grand pianos. These two menu lists are sourced from the inventory classifications in your AIMsi system. Populate these fields while working on the Customer Tab, as explained below.

POPULATING CUSTOMER FRONTLINE DATA FIELDS: STARTING ON THE CUSTOMER TAB

When filling out a customer record for the first time it is critical to make the first field entry in the Salesperson* field, located in the upper right corner of the screen. With the customer record in Edit mode you can left click the mouse in the blank field. Right click the mouse to select your ID from the menu list. Note that once the customer record is saved the entry made in this field can only be changed by a Customer Frontline database manager.

Next, click the mouse in the Store* field located in the upper center of the customer record. Select your store location from the menu list.

There are three fields on the Customer Tab that require you to make key entries, these fields do not have assigned menu lists:

1. Buyer: enter the first and last name of the person who you want identified to receive marketing and promotional announcements in letters, emails, labels, etc. This might seem redundant, but the "Last" and "Name" fields from the AIMsi customer record do not necessarily identify the main decision maker for the piano purchase. Customer Frontline will reference this field for mail, email, etc. merges.

2. Email: this is a shared filed with AIMsi, therefore it may already be filled in. If not, enter the email you will use to follow up with this customer.

3. CFREQ: enter the minimum number of days between follow up contacts with this customer that you want Customer Frontline to automatically calculate when scheduling your contact follow up calendar. *Do not* leave a zero in this field. See page 8 for more details.

See page 5 for details about the other three data fields on the Customer Tab. The data field attributes for the Profile 1 Tab are explained on page 6.

Other Fields on the Customer Tab With Drop Menus

CusType*

Select a customer attribute description

Item	Description
Church	Implies decision by committee or benefactor
Commercial	Business entity
Private	An individual or family
School	Implies purchase order, bid, etc.
Teacher	Referral source: RE in Rating field
Technician	Referral source: RE in Rating field

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

Rating*

Select customer's urgency to buy

Item	Description
1P	Have basic prospect information from store visit, remote inquiry, etc.
2P	Have met the customer, made a product demonstration, low urgency to buy
3P	"I would be shocked if this propsect doesn't buy a piano", follow up plan scheduled
4P	"I would be shocked if this propsepct doesn't buy a piano from me", urgent follow up
LO	Lost - propsect purchased a piano from another source
OW	Customer purchased piano from our company
RE	Referral source, a person who tells others to buy from me
zz	Propsect is no longer motivated to buy a piano

$: The Rating* field has been declared by sales professionals to be the most critical data used for prospect management. This is the old school “sales funnel”. It demands a combination of intellectual honesty and discipline. If the Ratings are accurate for all of your piano prospects you will find that Customer Frontline will organize and prompt you to “advance” prospects to a closing. For example, you can ask Customer Frontline to find all of your “3P” prospects. Then you can determine what it will take to advance each one to a “4P” and eventually to “OW”! Or, what will it take to advance a “2P” to “3P”? Your sales closing ratio will go up if you pay close attention to this critical prospect rating field!

Profile Tab Fields

The fields on the Profile tab are a combination of field types with and without assigned drop menus. The drop menu fields are identified with an asterisk at the end of the field name. The same left and right click mouse procedures work in these fields as they do on the Customer Tab.

Fields without an asterisk are used for open data entry - simply key enter the information you want stored in the field. These fields have a 21 space capacity (letter, numbers, blanks, etc.). Your cursor will flow to the next data field if this capacity is surpassed.

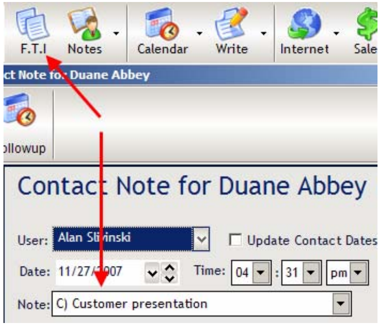
TIP: The fields on the Profile tab are organized to help you ask the questions needed to outline a complete customer qualification grid. This information will prove to be a valuable resource when following up with the customer, or when searching the database for customers according to specific buying qualifications.

Field	Content Description
Price Range*	Select the price range of the customer's destination piano
Price Proposal	Enter the price quoted to the prospect, if one was proposed
New - Used*	Select the customer's preference
Brand*	Select the customer's brand preference
Finish-Color*	Select customer's choice
Model	Enter the model number of the destination piano
Trade-In?*	Is a trade in piano part of this purchase? If NO, skip to the Player Name field.
Trade Type*	Select type of piano to be traded in
Brand*	Select the brand of trade in; "Upright" if too old for re-sale
Trade Value	Enter trade in allowance
Player Name	Enter piano player's name
Buyer's F. Name	Enter buyer's first name, this is the first name entered in the Buyer field on the Customer tab
Occupation	Enter the work background of the principal bread winner in the household
Ltr Signature	Enter your name as you would want it to appear in a marketing letter sent to this customer
Piano Teacher	Enter the name of the piano player's teacher
Referral Name	Enter name of the person who referred this customer to you
Delivery Fee	Enter delivery fee quoted to the customer
Invoice #	Enter the invoice # after the piano sale is closed[1]
Purch. Mo.*	Select month of piano purchase[1]
Purch. Yr.*	Select year of piano purchase[1]

[1] The last three fields in the list above are to be filled in when the piano sale is closed. The invoice number can be used for a quick search on the AIMsi tab to view the invoice, if needed in the future. The month and year fields provide a customer search key to follow up with periodic tuning reminders, full trade up offers based on certain time intervals, etc.

$: Verify that you have changed the Rating* filed on the Customer Tab to “OW”. If not, this customer will be considered as a prospect when Customer Frontline is requested to find piano prospects who will receive future sales promotion announcements! See page **X** for a review to update a customer record from a prospect to an owner.

Customer Contact Notes And Follow Up Calendar:



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. More details to schedule the next contact are on page 8.

The list below displays the contact headers and definitions used to document and describe the content of your most recent contact with a customer.

Procedure to enter a note and schedule a follow up contact:

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, see list below.
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. **$:** Always enter the answer to this question: "What's next?"
4. Verify the "Next Contact Date" (see page 8) and save the note.

Contact Type & Description

A) First Store Visit
The customer's first time shopping in your store for a piano

B) Return Store Visit
The prospect returns to the store for another look at pianos

C) Piano Purchase
The customer purchased a piano today (second note entry combined with A or B)

D) Email sent
Copy or summarize content of email sent to customer

E) Email received
Copy or summarize content of email received from customer

F) Phone call, outgoing
Summary notes of phone conversation with customer

G) Phone call, incoming
Summary notes of phone conversation with customer

H) Out of store visit
Summary notes of a visit to the customer's location

I) Remote event prospect
Customer information obtained at an outside event

J) Remote event purchase
Customer purchased at an outside event, entering the information

K) Sent proposal
Summary notes of a proposal sent to the customer

L) Owner Satisfaction
Follow up call to a customer who purchased from your store

M) Lost Sale
Customer purchased a piano from another source

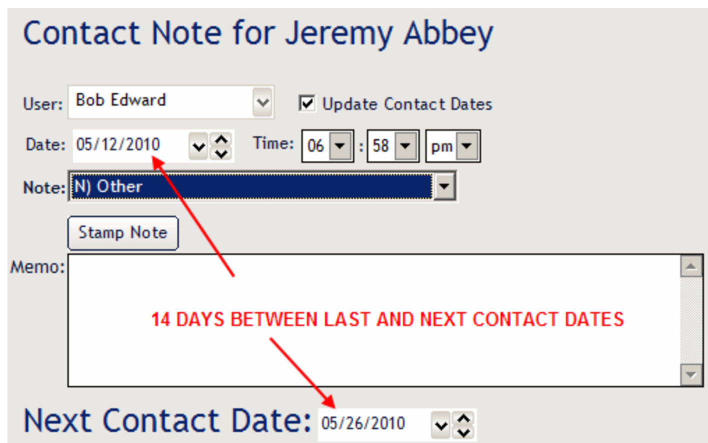
N) Other

Following Up With Customers

$: Customer Frontline will not let you forget to follow up with a customer, provided you follow two simple rules: 1. schedule a future contact date when making a notepad entry, as explained below; 2. click “Today’s Items” each day when logging in to Customer Frontline.

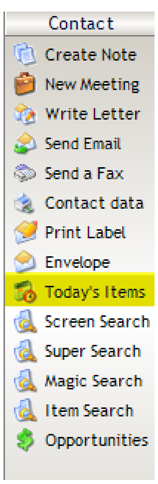
1. Scheduling The Next Customer Contact Date

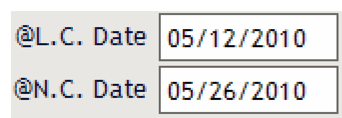
You must set a contact frequency between scheduled customer follow up contacts in the CFRQ filed on the Customer Tab. This number is entered when creating a new customer record or updating an existing record. The frequency value can be changed at any time when editing a record. Enter the number of days that you want Customer Frontline to count between reminders to follow up with this customer. For example, with 14 entered in this field Customer Frontline will include this record in your “Today’s Items” list 14 days after your last contact note is entered.



Notice that the next contact date is the fifth business day after the date of this note entry.
The next contact date can be manually set to any date you want by key entering a different date or by selecting a date from the calendar drop menu. This will not change the frequency value on the Customer Tab.

2. The Daily Customer Contact Follow Up Routine





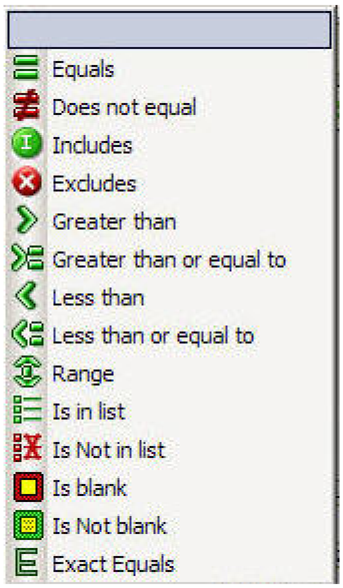
When the Today’s Items button in the left toolbar is clicked Customer Frontline will locate and gather all customers who have your ID in the Salesperson field with a Next Contact Date that is equal to or prior to the day you initiate this utility. The sample note above was saved with 05/26/10 as the Next Contact Date. Consequently, when sales person BEDW activates the Today’s Items utility on that day the customer record for Jeremy Abbey will be listed as a scheduled contact.

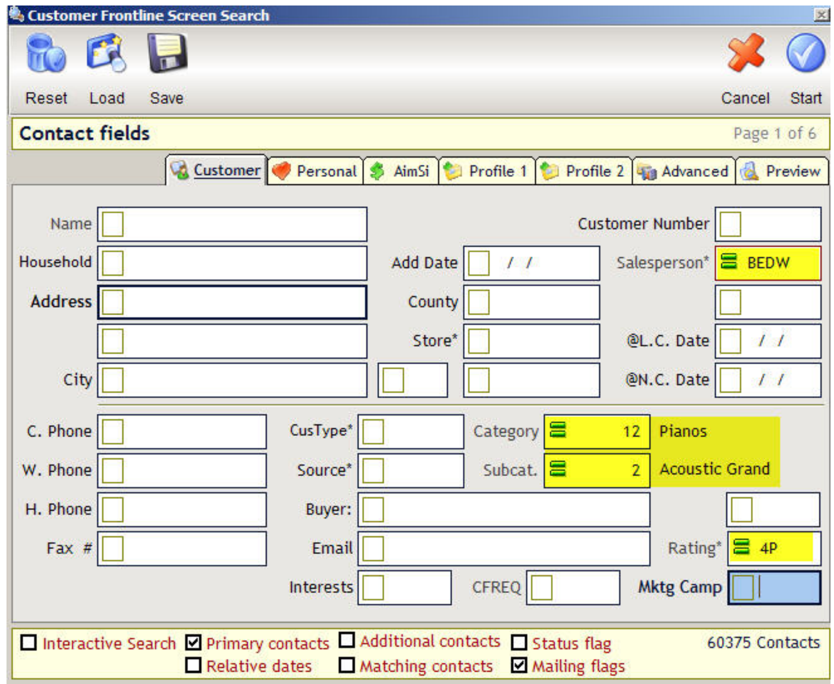
It is important to maintain your schedule of follow up contacts to prevent the Today’s Items list from growing to an unmanageable length. Remember, Today’s Items will find all customers that are assigned to you with a Next Contact Date that is equal to or less than the current date. In other words, to remove a customer from Today’s Items requires that a notepad entry be made with a future “Next Contact Date” assigned to it.

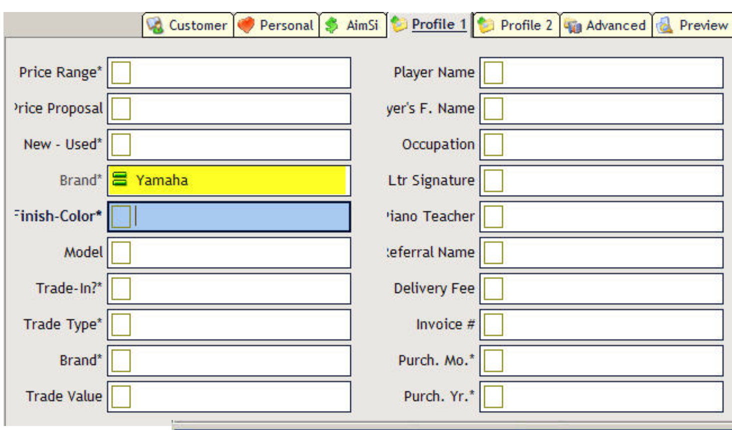
$: There will be circumstances when a customer is not qualified for a future contact. You want to avoid unqualified customers from populating your Today’s Items list. Open the Notepad utility, select an appropriate contact type from the drop down menu, such as “Other”. Key enter a futuristic date in the Next Contact Date: 12/12/2100. It’s easy to key in, and most likely beyond the time that any of us will be selling pianos!

Finding Customers 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.

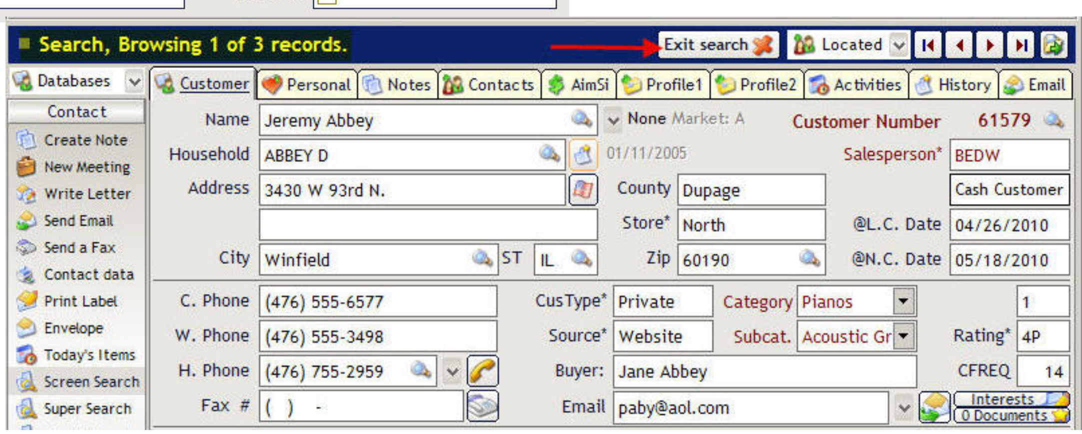






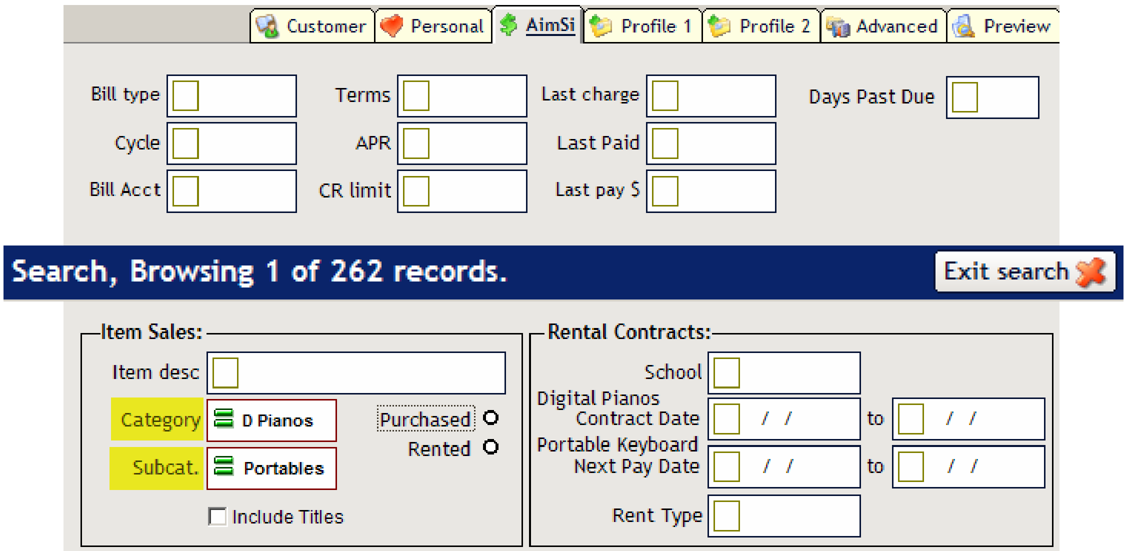
Example: the search commands in the screens above and on the left will find piano prospects who are urgently qualified to buy Yamaha Grands and are assigned to sales person “BEDW”. The screen below shows the customer search results: three prospects were located in the database from this search that included the five specific customer qualifications.

Notice the yellow highlighted Search count. While in a search mode Customer Frontline will limit your database access to those records that were qualified by the search. Click the “Exit Search” button to return to the full customer database.

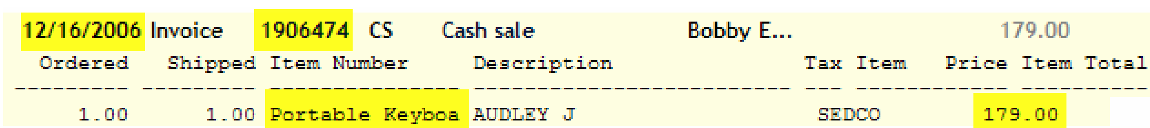


Finding Qualified Customers in AIMsi From Customer Frontline: Database Marketing

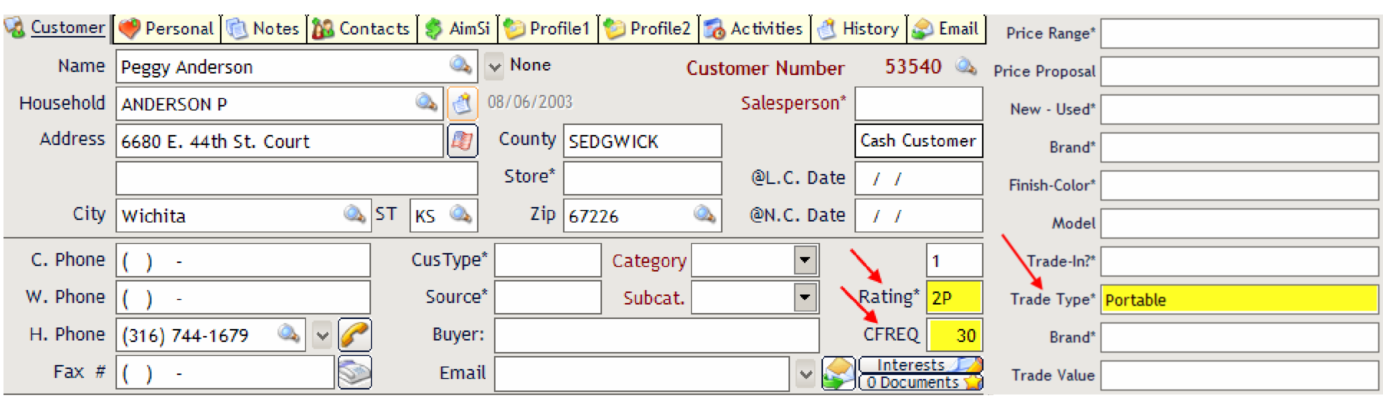
One of the most valuable resources in your AIMsi system is found in the sales transaction histories of each customer who has made a purchase from your company. For example, customers who purchased a piano some time in the past would most likely have been entered into your AIMsi system when the invoice was issued. Therefore, that customer is already accessible in Customer Frontline. The data search engine in Customer Frontline looks at AIMsi sales histories in a variety of combinations. The example below shows a screen search entered on the AIMsi tab to find owners of portable keyboards. Notice that 262 customers were located from the AIMsi system who purchased portable keyboards. **$:** Customer Frontline has gathered these customers together so that a marketing campaign can be organized to solicit these customers with an offer to return to the store for a clinic, lesson program, full trade up, etc.



Here is a portable keyboard purchase transaction that is listed in the sales history on the AIMsi tab in Customer Frontline. With this information a sales person knows when the purchase was made, the price, and the invoice number. With a double click on the invoice header Customer Frontline will display the entire invoice to provide additional information about this purchase.



Notice the sample customer record below…three data fields are highlighted in yellow. The "Group Replacement Wizard" utility in Customer Frontline was used to place the three field entries highlighted in yellow into the 262 customer records of portable keyboard owners. This procedure takes less than one minute. With these data fields populated a standard screen search on any combination of these fields will find customers who are qualified for a follow up contact because they purchased a portable keyboard. As these customers are contacted the sales person who does the outreach can populate the remaining Customer Frontline fields to outline a qualification and follow up strategy to close a future sale.



Some Helpful Tips and Reminders to Manage Your Customer Frontline Database

When You Close a Piano Sale

Remember to update the customer record so that your new owner is not solicited in the future as a prospect.

Update the customer's notepad. One of the entries must be "c) Piano Purchase". Also enter a notepad line if the customer entered the store on the day of the purchase, either a first or a return visit.

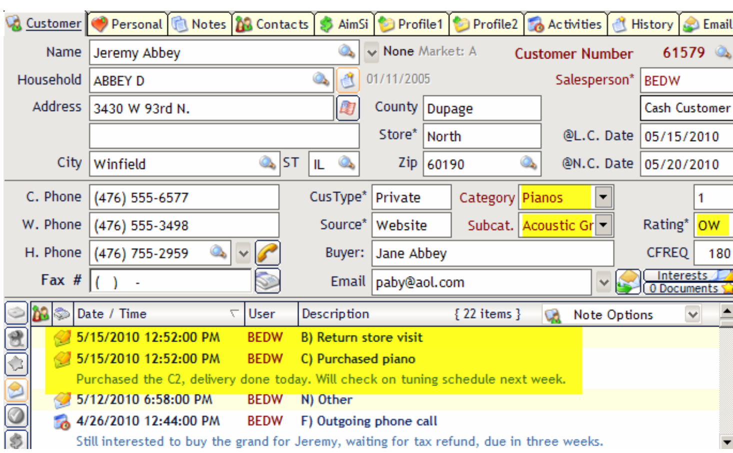
Next, update the Customer Frontline data fields to properly categorize all aspects of the piano purchase.

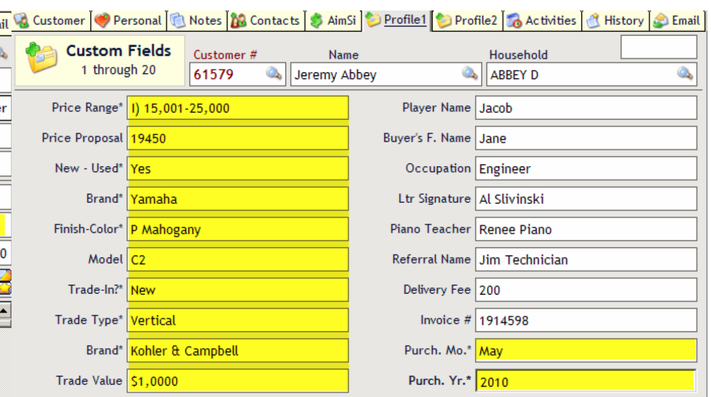
Customer Tab

- Category = (choose from drop menu)
- Sub Category = (choose from drop menu)
- Rating = OW

Profile 1 Tab

- All data fields on the Profile 1 tab must be verified. This data will be valuable for future marketing initiatives such as inviting customers to clinics, workshops, etc. The Purchase Month and Purchase Year fields are critical to manage your trade in value policies and for sending out tuning reminders. With these two fields populated a screen search can be done to find piano owners who purchased a certain category of piano in a target price range in a given month and year. Customer Frontline will find customers according to those qualifications so that you can solicit trade ins as a part of a step up promotion. Many piano sales people send out tuning reminders every six months. This has proven to be an effective way to build and cultivate a referral network because your piano owners are reminded every six months that they purchased their piano from you at your store. People talk to people. Word of mouth proves to be the most valuable "advertising" source that yields new piano shoppers.





$: START CLOSING MORE PIANOS WITH YOUR CUSTOMER FRONLTINE PIANO SELLING SYSTEM!

Questions, Criticisms and Comments
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CUSTOMER FRONTLINE