

Customer Frontline™ Prospect Rating System

Rating: Sale Pending Categories

1P: Name, address, phone #...from outside displays, promotions, salesperson has not personally met this prospect.

2P: Salesperson has met this prospect; there is a basic agreement with the prospect that they would like to have and can afford to buy a piano.

3P: Prospect is shopping, the salesperson ***“would be shocked if this prospect didn’t buy a piano from someone”***. All fields on the Customer and Profile 1 tab of the customer record should be filled in. The notepad entry outlines the objective of the next customer contact and the future contact date is displayed in the next contact field.

4P: The salesperson ***“would be shocked if this prospect didn’t buy from me”***. Time sensitive contact with the prospect is maintained, the sale is imminent. A Sales Opportunity entry with a closing date is required.

OW: The customer owns a piano from your company.

The screenshot shows the Customer Frontline software interface. The main window displays a customer record for Fred Gisnevich. The record includes the following information:

- Name:** Fred Gisnevich
- L. Name / Org:** GISNEVICH
- Address:** 5432 E. West St.
- City:** Henderson, NV
- Zip:** 89052
- County:** CLARK
- Country:** USA
- Customer Number:** 59184
- Salesperson:** XADS
- C. Phone:** (702) 345-8899
- W. Phone:** () -
- H. Phone:** (702) 555-1212
- Fax #:** () -
- C. Type:** Private
- Source:** Dir Mail
- Spouse:** Elvira
- Email:** ads@rbsolution.com
- Category:** Pianos
- Subcat:** Acoustic Gr
- Rating:** 3P (indicated by a red arrow)
- CFREQ:** 10

The bottom section of the interface shows a list of activities:

Date / Time	User	Description
12/10/2007 3:57:00 PM	ADS	C) Return store visit
11/27/2007 3:36:00 PM	ADS	C) Return store visit
Took another look today, but went to look at another brand. I can't seem to close a door!		
11/8/2007 3:35:00 PM	ADS	A) First store visit
Looked at grand pianos. They like me a lot.		

RE - This customer is renting a piano from your company

LO - This field entry is used when a customer purchases a piano from a competitor

WHEN YOUR PROSPECT BUYS A PIANO - UPDATE PROSPECT TO OWNER

Customer Frontline is designed to help you build and cultivate a trade-up and referral sales network populated by people who have purchased a piano from you. It is important that all customer profile fields are correctly updated as illustrated below. With this information in place you can search for piano owners based on many different qualifications, such as one year purchase anniversaries, trade-in offers based on purchase price ranges and piano brand, etc.

Customer Frontline
 File Edit View Contact Search Tickets Opps Activities Write Internet Sales Reports Tools Wizards Help

Piano Sales & Marketing Type a company to find Recent

Databases Customer Personal Notes Contacts AimSi Profile1 Profile2 Activities History Email

Contact
 Create Note
 New Meeting
 Write Letter
 Send Email
 Send a Fax
 Contact data
 Print Label
 Envelope
 Today's Items
 Screen Search
 Super Search
 Magic Search
 Item Search
 Opportunities

Name: Fred Gisnevich Customer Number: 59184
 L.Name/Org: GISNEVICH 10/03/2006 Salesperson*: XADS
 Address: 5432 E. West St. County: CLARK Cash Customer
 City: Henderson ST NV Zip: 89052 @L.C. Date: 02/01/2008
 @N.C. Date: 02/04/2008
 C. Phone: (702) 345-8899 C. Type*: Private Category: Pianos Rating: OW
 W. Phone: () - Source*: Dir Mail Subcat.: Acoustic Gr
 H. Phone: (702) 555-1212 Spouse: Elvira CFREQ: 10
 Fax #: () - Email: ads@rbsolution.com

Date / Time User Description { 4 items } Note Options
 12/10/2007 3:59:00 PM ADS D) Purchased piano
 I finally did it!!! Call in early Feb. to schedule second tuning.

Piano Sales & Marketing Type a company to find Recent

Databases Customer Personal Notes Contacts AimSi Profile1 Profile2 Activities History Email

Custom Fields 1 through 20 Customer # 59184 Name Fred Gisnevich L.Name/Org GISNEVICH

Price Range*: I) 15,001-25,000
 Price Proposal: 21500
 Payment Plan*: Credit Card
 Brand*: Yamaha
 Finish-Color*: P Mahogany
 Model: C2
 New-Used*: New
 Trade Type*: A) None
 Brand*:
 Trade Value:

Player's Name: Gertrude
 Occupation: Blacksmith
 Other S.P.:
 Ltr Signature: Al Slivinski
 Piano Teacher: Renee Piano
 Referral Name: none
 Delivery Fee: 250
 Invoice #: D3487
 Purch. Mo.*: December
 Purch. Yr.*: 2007