



# LEADS SPECIALIST GUIDE

## ENGAGING LEADS

Start with this 2-Minute Drill to bring a lead to life.

**CHECK: Is this a current or new customer?**

Look this information up in the CRM or customer database and adjust your message.

**PREPARE: Dig into the PERQ Experience(s) they interacted with and review their website history.**

Consider what they are interested in and find a way to personalize your message to them.

**DETERMINE: Based on what you've found in the CRM, how can you help the customer?**

Remember, follow-up is key. Provide a reason to engage such as a special, new product suggestions, low or final inventory, etc. Make it personal to them!

**INCENTIVIZE: What can you add to get the lead to respond?**

Offer assistance | Sell the visit | Sell the VIP Appointment

**PERSONALIZE: ALWAYS end with asking a personalized question.**

Make the first move, build rapport, and aim for more engaged conversations.

## GOAL

# 20%

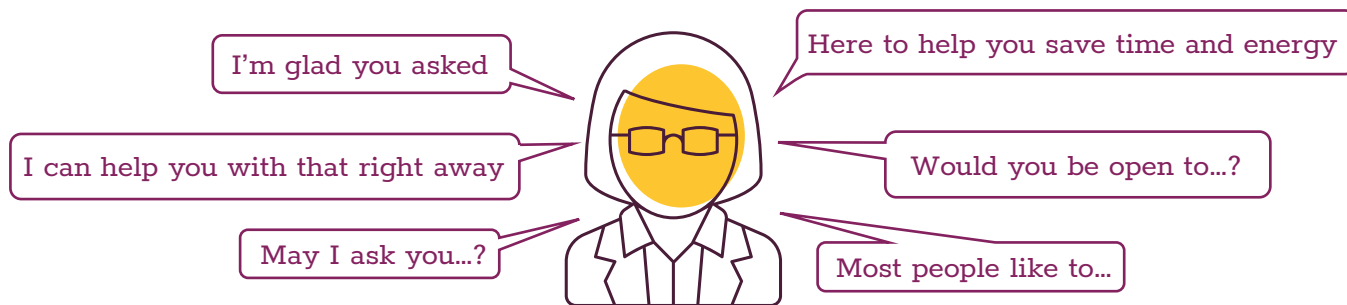
of leads turn into  
Digital Ups

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## TIPS FOR SUCCESS

- Be FAST on your initial reach out.
- Schedule your next follow up as soon as you send a message.
- Offer to arrange a VIP appointment using the VIP Appointment image as part of your follow up.
- When it's time to hand off the lead to your Digital Ups Specialist, make the customer feel like they're getting better expertise. Respond with a message such as: "I'd be glad to assist you. Let me connect you with a product expert who can help." Then, tee up the lead to an available Digital Ups Specialist.

## INTRODUCE YOURSELF & TYPE PRETTY



## OUTREACH PLAN (WITH 90-AUTOMATED EMAIL NURTURING)



Strategic guidance provided by:

kain  
UNIVERSITY





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## TEXTING STRATEGIES

- Text from the CRM so you and the Digital Ups Specialist can keep track of the customer's messages and follow up.
- Remember, you're entering a space usually reserved for friends and family. Be polite!
- Always introduce yourself upfront on the first text, then leave your name at the end of any follow-up messages.
- Watch spelling and be adorable!
- Use appropriate, personalized questions to trigger a response.
- When in doubt, be helpful!
- Remember, you'll get the occasional "stop" from the consumer. Respect their wish and give them their space. This is the digital equivalent to "I'm just looking" you hear in-store.

### Pro-Tip: Use These 2 Questions When Possible:



Is price or quality the most important in your purchase? I can send you some options other customers have enjoyed.



Should I place a hold on this item until you come in?

## PERSONALIZATION STRATEGIES FROM PERQ EXPERIENCES TO HELP WITH LEAD FOLLOW-UP

### DIGITAL QUIZZES

See what the quizzes recommended, mention it and ask if you can send a couple of products that you think would fit them.



I see you learned from our website quiz that you are \_\_\_\_\_ style. Do you agree? Can I send you a picture of a couple of items that would fit your style?

### PRODUCTS OF INTEREST

Review the products they were looking at when they checked for a special offer, asked a question, or requested more info, and make your responses personal:



I see you were looking at the \_\_\_\_\_ product. Can I send you a picture of the product a lot of my customers ended up buying after looking at that first?