PATH TO PURCHASE: RETAIL HAND-OFF IN THE SHOWROOM

Retail Hand-off

Once a client has visited our showroom we want to continue their premium luxury experience. We want to ensure the rest of the purchase experience matches the Sub-Zero and Wolf standards. We continue to be a resource for the client.

Once it's appropriate, the Showroom Consultant initiates a warm transfer to the dealer contact person on the customer's behalf (in priority order): Dealer and client in person at the showroom, client in person at the showroom with the dealer on phone, or client and dealer on phone.

Participating dealers will be expected to follow specific expectations of service, installation, and process involvement as outlined in their Dealer Service Level Agreement.

1 - EVALUATE

Determine IF, WHEN, and HOW a retail hand-off should take place.

IF	WHEN	HOW
• Do we have the client's permission? • Does their project warrant a hand-off? • What is the relationship with specifier and/or dealer.	• Does the client have a preference? • What is the project timeline?	• Showroom Appointment • Conference Call with dealer and client • Email hand-off and follow-up

However, before we can move forward we need the client's permission:

CLIENT READY	CLIENT NOT READY	CLIENT DECLINES
• SC initiates the hand-off? • Update DCRM Hand-off Status to "Accepted" • Update "Dealer Determined" field: "Client Relationship", "Specifier Relationship", "No Dealer Relationship"	• SC continues follow-up and maintains relationship. • Update DCRM Hand-off Status to "Pending"	• SC continues follow-up and maintains relationship and makes themselves available to assist client in any way. • Update DCRM Hand-off Status to "Declined"

2- INITIATE

To begin the retail hand-off a dealer will need to be determined.

CLIENT PREFERENCE	SPECIFIER/DEALER RELATIONSHIP	NO PREFERENCE OR EXISTING RELATIONSHIPS
• If the client has an existing relationship with a dealer that preference supersedes all other options. • Dealer must be added as an influencer in DCRM	• We honor any existing relationships between specifiers and dealers.	• SC can offer up to three options for the client. • Options can be based on geography or “round robin” • When appropriate include a primary market dealer as an option

Determine the hand-off type:

SHOWROOM APPOINTMENT	CONFERENCE CALL	COLD HAND-OFF
• An appointment in the showroom is coordinated by the SC for the “Dealer Champion” / Salesperson and the client. • Indicate the Hand-off Type in DCRM: “In-Person”	• A conference call between all parties is scheduled. • Indicate the Hand-off Type in DCRM: “Conference Call”	• A cold hand-off can take place is either party is not available or declines the appointment / call. • Indicate the Hand-off Type in DCRM: “No Client Presence” or “Client Declined”

NOTE: When dealing with a Dealer Champion ensure they check their sales system for any client/salesperson relationships.

PROVIDE PROJECT DETAILS
• As part of the retail hand-off it’s important that the showroom consultants share all project details on behalf of the client. Include the scope, location, and timeframe of the project in addition to any appliance specifics. • Email quote and details to the dealer and trade professionals as appropriate. • If Dealer becomes unresponsive, escalate the situation to the TSM. Have the TSM reach out (or visit) the dealer for a status update.

3- COMMUNICATE

We want to ensure the rest of the purchase experience matches the Sub-Zero and Wolf standards. The Showroom Consultant will continue to be a resource for the client even after the hand-off has taken place. The Showroom Consultant oversees the communication stream between dealer and customer.

CONSTANT COMMUNICATION

- SC maintains an open line of communication with the client to ensure the dealer is properly assisting them.
- DCRM will send bi-weekly status emails to the dealer on behalf of the showroom consultant.
    - Dealer simply clicks the appropriate status within the email.
    - Project statuses include: “Contacted”, “Ordered”, “P.O. Provided”, “Installation Complete”, “Project Lost”, “Project Delayed”, or “Project Cancelled”
- If no update or response has been made one week after status update email has been sent to the TSM.
- If Dealer becomes unresponsive, escalate the situation to the Showroom Manager to have them reach out to the TSM directly. Have the TSM reach out (or visit) the dealer for a status update.

4- CLOSE THE OPPORTUNITY

CLOSE OUT THE OPPORTUNITY

- Dealer Salesperson or Dealer Champion provides purchase order to the Showroom Consultant:
    - Provides Invoice details
    - Provides alerts / reason as to quote variance
    - Provides final invoice information
- Showroom Consultant verifies all purchase details and registered products.
- Showroom Consultants follows-up with client an all lost opportunities.

Update the quote status in DCRM:

OPPORTUNITY WON

- If at least one Sub-Zero or Wolf product has been purchased, select Update Won/Lost Products.
- Check the "Won" checkbox for each product purchased.
- Dynamics will automatically update the Won Amount and Lost Amount fields.
- Attach the Invoice to the opportunity via the Notes activity.

OPPORTUNITY LOST

- If no Sub-Zero or Wolf product has been purchased, update the Status Reason as "Lost".
- Select Appropriate Lost Reason.
- If competitive products were purchased, select the brand of the competitive product.
- Alert TSM when a significant Invoice variance exists.
    - A significant variance is +/-10% or +/-1 or more products

Post installation Follow-up

POST INSTALLATION

- Showroom Consultant verifies all product registrations
- Showroom Consultant sends the client a personalized thank you note.