



Contacting Customers for Special Orders

Intent

To ensure that we call our customers as soon as their special order products arrive

Audience	Apprentice Tech and above
Schedule	Add time for this talk into your weekly schedule. It should only take 10-15 minutes, but you should allow 30 minutes to include extended discussions that may occur.
Prepare	<p>A day ahead:</p> <ol style="list-style-type: none"> 1) Print and review this talk, Special Orders: Receiving and Contacting the Customer Best Practices, and the Brand Dimension / Brand Promise. 2) Watch the Contacting the Customer video on the Managing Your Inventory KC page. 3) Identify specific opportunities for your store and recent examples that may apply. 4) Plan how you will follow up to ensure performance improvement.
Deliver	Make this real and fun for your people. Bring your energy to the talk and engage everyone to come up with solutions to improve performance. Set clear expectations for your team. Make sure everyone understands how contacting customers right away impacts the Happy Customers gauge.
LMS	After the talk, have every participant log into the LMS and complete the acknowledgment.
Follow up	Review special order POs daily to ensure customers have been contacted.

Contacting Customers the Day Product Arrives

Explain: We need to keep our promise on special orders and always contact customers promptly when their products arrive. Treat customers how we want to be treated.

Watch: Watch the **Contacting the Customer** video on the [Managing Your Inventory KC page](#). (3^d video on page)

Answers

Question 1: Why is it important to call customers the same day?

- Keeping our promise to customers (Brand Promise)
- Ensure we don't transfer to another store or sell to another customer

Question 2: How well are we doing on calling customers promptly when their products arrive? If we are not executing, why not?

- Not following the Best Practice
- No clear expectations
- Not sure who is responsible
- Don't have a special order rack or clear process

Question 3: What do we need to do to guarantee that we always call the customer the same day their product comes in?

- Clear process
- Clear responsibilities
- Special order rack

Call to Action:

- 1) Ask participants to log into the LMS and complete the acknowledgment for this talk.
- 2) Set expectations for executing on the Best Practice.
- 3) Explain how you will support this and how it improves CDI.
- 4) Ask if anyone has questions. If there are questions or concerns you cannot answer, notify the Store Manager.