

PROMOTIONS & OTHER SPECIAL EVENTS

Our stores benefit from a variety of promotions and in-store special events, including Trunk Shows, company-wide promotions (i.e. One Cent Sales) and individual store promotions (i.e. Champagne Parties).

While the company plans and advertises a number of promotions throughout the year, store managers do not have to wait on the company or their regional/district manager to plan a promotion. In fact, with their regional/district manager's knowledge and consent, most successful Daniel's managers generally do take the initiative to plan and prepare for several of their own special events throughout the year.

Providing they follow company guidelines, and have regional/district manager approval, managers are encouraged to use the available tools indicated in this chapter to plan special events and do special mailings.

Promotions and special events are not necessarily planned months, or even weeks, in advance.

- Sometimes a store is having a difficult month and, at the last minute, the manager decides to hold a special "CHAMPAGNE PARTY," inviting and recognizing their customers on the anniversary date of their Daniel's charge account.

-or-

- Maybe it has been awhile since a special sale and the store needs some spark and excitement so the manager plans a "BIRTHDAY PARTY," and invites their customers with birthdays anytime during the month.

-or-

- A new manager comes to the store and wants a special opportunity to meet customers so the store holds a "PREFERRED CUSTOMER" sale.

-plus-

- Other fun, creative and successful promotion ideas. Managers are encouraged to speak to their regional/district managers about potential special event ideas.

When stores run individual promotions, with the regional /district manager's approval, managers are encouraged and expected to send mail to the targeted customers, telemarket targeted customers, and to be ready with adequate staffing, snacks, free gifts and a clean, well-organized store. Other advertising is usually saved for company-wide promotions or Trunk Shows.

If managers have questions about advertising or how to promote a special event, they should call either their REGIONAL/DISTRICT MANAGER or the SMC ADVERTISING DEPARTMENT.

NEW ACCOUNT PROMOTION

It is important for every store employee to always do the things that will increase the number of Daniel's accounts throughout the year. Occasionally, the company will announce a limited time promotion entitled "Take The Daniel's Credit Challenge" that often includes incentives for a customer that does not have and has not previously had a Daniel's account.

- *Each promotion includes different rules and procedures that are published prior to the beginning of the promotion and available in the Promotion Planner. Below is a sample of the notice that was published for the 2007 summer promotion.*

2007 Daniel's Credit Challenge

Due to last year's success with the **Summer New Account Promotion**, we are running a **BIGGER, MORE EXCITING** version for 2007!

WHEN: **PHASE 1: July 2nd – July 17th**
 PHASE 2: July 18th – September 30th

WHAT: **Take The Daniel's Credit Challenge = Apply for Daniel's Credit Approval Guaranteed, or you WIN a \$50 GIFT CARD**

HOW: **Customer receives Credit Approval OR, we will give them \$50 in merchandise or a \$50 Daniel's Gift Card.**

NEW!

Phase 2!: Just for FILLING OUT THE APPLICATION & waiting for approval, we will give a pair of Sterling Silver CZ Earrings (round or princess)
Associates MUST RING earrings THROUGH THE POS at \$0.00 using SKU numbers 550-01895 (round) or 550-01903 (princess)

NEW!

Potential Phase 2 Addition!

Just for playing the Daniel's challenge, you enter to win a **\$10,000 shopping spree** (\$10,000 is based on the RETAIL ticket price)

Promotion RULES:

- Must be 18 years of age or older with a valid picture identification.
- Customer can qualify ONE TIME ONLY during contest period, & **ONLY** for Daniel's IN-HOUSE Credit
- Jewelry Accents /GE Money does NOT qualify as an application (Only Daniel's)
- Some down payment may be required
- Application must be completed & processed to a Final Approval &/or Decline
- Approval might be subject to additional documentation
 - Pending Bankruptcies must be resolved prior to applying
- Existing Daniel's credit account holders **DO NOT** qualify.
 - An existing account holder is defined as any customer who has a current, past due, or write-off account. Even if the account has been discharged in bankruptcy, the customer does not qualify for the challenge although they are welcome to re-apply.

MORE INFORMATION ON NEXT PAGE.....

MERCHANDISE CONTEST PRIZE & DONATION

When a new store is opened, and at other times a manager may obtain authorization to conduct a customer contest to win merchandise, donate merchandise to the mall for a customer contest, or donate merchandise to a specific charity.

- Authorization for a contest or donation must be obtained from a Regional or District Manager in agreement with the Director of Stores.
- A Merchandise Release Authorization Form listing the item(s) to be given away or donated must be signed by a Vice President or Director and obtained before the merchandise can be advertised as the contest prize or agreed to be donated.

A sample Merchandise Release Authorization form and the procedures for completing it are on the next two pages.

DONATION & CONTEST MERCHANDISE PRIZE RELEASE AUTHORIZATION FORM SAMPLE



MERCHANDISE RELEASE AUTHORIZATION

TO: _____ STORE # _____ DATE _____

The manager is authorized to release the following merchandise:

Sku #	Description	Retail Price
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☐ Donation to: _____
Name of Charity (print)

☐ In-Store "Free Drawing"

AUTHORIZED BY: _____ (SMC Staff Member) _____
Employee No.

Instructions:

- Complete a transfer to Store "100" listing the above item on the transfer and write the name of the person or organization that the item was **donated to** or **won by** in the comments area of the transfer. Attach a copy of this completed form to the green store copy of the transfer for your records.
- If this is a donation**, verify that the person receiving the merchandise is an authorized representative of the organization listed above. Then have the recipient complete lines 1-6 below.
- If this is a Free drawing prize**, verify the winner's identification, and then have the recipient complete lines 1-6 below.
- Send this form with the transfer attached to SMC; Attn: (person who authorized this transaction – see above.)

* * * * *

I completed the above steps before releasing the merchandise.

_____ Store Manager's Signature	_____ Employee Number
------------------------------------	--------------------------

RECEIPT ACKNOWLEDGEMENT:

I hereby acknowledge receipt of the above listed merchandise:

- | | |
|---|--|
| 1. _____
Organization/Recipient's Name (print) | 2. _____
Recipient's Representative Name (print) |
| 3. _____
Address | 4. _____
Phone No. |
| 5. _____
City, State, Zip | 6. _____
Recipient's Driver's License No. |

CONTEST & DONATION MERCHANDISE RELEASE FORM PROCEDURES

A Merchandise Release Authorization Form listing the item(s) to be given away or donated must be signed by a Vice President or Director and obtained before the merchandise can be advertised as the contest prize or agreed to be donated.

- The “AUTHORIZING” PERSON must complete all blanks on the form above “Instructions”, retain a copy, and make sure that the original form and transfer is sent back to SMC.
- Original copy of the Merchandise Release Authorization form is to be sent to the store or SMC department giving away the item(s).
- The store or SMC department manager must follow the instructions and complete all the required blanks on the form.
- The store manager must also:
 - write a transfer to Store #100 listing the item(s) given away,
 - attach the transfer to the completed Merchandise Release Authorization form, and
 - send them in the A-box to the authorizing person at SMC.
 - The store manager must attach a copy of this form to the filed green store copy of the transfer.
- The authorizing person should record the receipt of the completed form and transfer before providing it to the Distribution Dept.
- The Distribution Dept. should enter the transfer to adjust the item from stock. If the item(s) are given away from SMC inventory, an inventory adjustment should be made for it. A copy of the Merchandise Release Authorization form must be attached to the accounting copy of the adjustment.

PROMOTION PLANNING TIMELINE

The success of any promotion is dependent upon a variety of factors, not the least being advanced preparation work done in the store by the manager and associates.

In order to be ready for any last minute promotions or parties, well prepared managers keep a variety of “basic” supplies on hand in the store at all times.

The following steps are to be followed before all events in which SMC is not doing targeted mailing specifically to the store’s customers. In other words, three procedures are to be followed for **almost all promotions, except Trunk Shows**.

2 WEEKS PRIOR TO EVENT (assuming the event is already scheduled):

- Inform associates about upcoming events and begin handing out event flyers.
- Run proper POS customer mailing list report(s) (see instructions p. 8) and prepare mailings.
- Order necessary supplies including balloons, repair supplies, fax paper, credit and GE Luxury applications, Dealmakers, Daniel’s bags, gift-wrapping supplies, free gifts, etc.

1 WEEK PRIOR TO EVENT:

- When preparing schedule, ensure proper event staffing without going over allowed hours.
- Be sure all alarms and locks are operable and that you have enough case keys for extra help.

3-4 DAYS PRIOR TO EVENT:

- Send “Did You Know” and/or other promotional mail.
- Buy snacks.

1-2 DAYS PRIOR TO EVENT:

- Associates and managers make telemarketing calls (see instructions & suggested scripts, p. 8 & 10)
- Make sure all displays and banners are ready.

MORNING OF EVENT:

- Hang & display correct signage including banners, 8 ½ x 11” in plexiglass stands, case signs, etc.
- Set-up displays as directed by Visual Merchandising.
- Set out snacks.

TRUNK SHOW PLANNING TIMELINE

Before a store's TRUNK SHOW, SMC does a tremendous amount of mailing and telemarketing to the store's customers. However, in order to maximize the success of Trunk Show events, there is also much preparation work to be completed at store level.

There is a company expectation that store managers follow the steps listed below before all TRUNK SHOWS.

2 WEEKS PRIOR TO EVENT:

- Inform associates about upcoming Trunk Show
- Prepare mailing of extra Trunk Show postcards to customers not on SMC's mailing list, including Insta-Apps, Jewelry Express, cash customers, etc.
- Order necessary supplies including balloons, repair supplies, fax paper, credit and Jewelry Express applications, Dealmakers, Daniel's bags, gift-wrapping supplies, free gifts, etc.
- Every customer leaving the store without a purchase should be told about the upcoming event.

1 WEEK PRIOR TO EVENT:

- When preparing schedule, ensure proper event staffing without going over allowed hours. Remember, bonus allowed hours.
- Be sure all alarms and locks are operable and that you have enough case keys for extra help.
- Order helium, if necessary.

3-4 DAYS PRIOR TO EVENT:

- Mail extra Trunk Show postcards to prepared list.
- Hand-out post-cards to walk-in customers.
- Buy snacks.
- Verify SMC telemarketing.

1-2 DAYS PRIOR TO EVENT:

- Associates and managers make telemarketing calls (see instructions & suggested scripts, p. 14)
- Hand-out extra Trunk Show postcards to other mall and/or area merchants.
- Make sure all displays and banners are ready.

MORNING OF EVENT:

- Hang & display correct signage including banners, 8 ½ x 11" in plexiglass stands, case signs, etc.
- Balloon store, including an arch at the store's main entrance.
- Set out snacks, coffee and champagne.

TRUNK SHOW PLANNING TIMELINE

(Cont.)

DAY FOLLOWING EVENT:

- Verify that all employees know that the Associated driver must not leave the store without the Trunk merchandise.
- A reminder notice may be posted on the day of the Trunk to assist with everyone remembering to ship out the Trunk merchandise (see sample of this notice below). If this notice is not posted, all employees are still expected to verify that the Associated driver takes the Trunk merchandise shipment.



URGENT REMINDER

PLEASE - Don't Forget



**TRUNK A-BOX MUST GO OUT
VIA ASSOCIATED ON**

_____ NO EXCEPTIONS!

POS CUSTOMER MAILING LISTS

It is helpful for stores to be able to target certain customers with available open-to-buy on their Daniel's accounts for the various store promotions. While SMC does a tremendous number of "Did-You-Know" mailings before Trunk Shows, for many other promotions it is up to the stores to run their own mailing lists.

- POS generated mailings lists should be run approximately two weeks before a promotion in order to allow adequate time for the mailing pieces to be completed.
- The mail should actually be sent about 3-4 days before the promotions and customers called 1-2 days before the promotions.
- **Mail should be addressed and prepared during store hours, at the display cases in between customers (never back in the office).**
- The 131S, DID-YOU-KNOW list is the most frequently run mailing list. However, there are other lists available on our POS system. Store managers should work with their district managers to determine which lists to run and when to run them.
- Each store has the capability of easily running the following automatic customer mailing lists:

- 112 -** WE MISS YOU list for closed accounts
(see *POS Manual*, p. 133)
- 112 -** THANK YOU list
(see *POS Manual*, p. 134)
- 131C -** CUSTOMER SERVICE REPORT list of customers with Customer Service Approvals (see *POS Manual*, p. 130)
- 131H -** HOT ZONE Report list of customers in the Hot Zone
(see *POS Manual*, p. 132)
- 131S -** DID-YOU-KNOW list for Silver and Gold Card customers
(see *POS Manual*, p. 131))
- 132C -** ANNIVERSARY/BIRTHDAY list for the current month (see *POS Manual*, p. 129)
- 132N-** ANNIVERSARY/BIRTHDAY list for the next month (see *POS Manual*, p. 129)

Customer mailing lists are highly confidential and must be tightly controlled in the stores. When the store finishes using a list, the list must be sent back to SMC to be shredded.

DID-YOU-KNOW MAILING PIECES

Did-You- Know lists (POS 131C, 131H, 131S reports) are automatically broken into four separate codes (DYK 1, 2, 3, 5). The letter codes stands for the following: Code #1 – no money down, Code #2 – no CSA available, Code #3 no money down, no change in payments, and Code #5 for Pre-Approved accounts. Provided below are samples of two \$100 gift checks. Sample A is to be used with Pre-Approved DYK's and sample B to be used with Closed Account DYK's.

The company provides pre-printed mailing pieces for each letter code. Managers and associates are just asked to fill in the blanks.

Please see a sample Did-You-Know card below:

Pre-Approved

CONGRATULATIONS!

We are delighted to inform you that your application for a Daniel's Charge has been accepted

AND YOU ARE PRE-APPROVED TO CHARGE UP TO \$_____.

AUTHORIZED BY: _____ DATE: _____

Some down payment may be required.
YOU MUST PRESENT THIS CERTIFICATE AT TIME OF PURCHASE.
Offer is valid 30 days from above date, is based on account status as of above date and is subject to credit approval.

Daniel's

Please see the sample coupon to be used with PRE-APPROVED Did-You-Know (Sample A) card below:

Pre-Approved

Epecially for: _____

Receive \$100.00 OFF any non-advertised fine jewelry purchase of \$299.95 or more with this certificate.

Daniel's

Authorized by: _____
Expiration Date: _____

Excludes advertised sale items, watches, special order items and Millennium Diamond purchases.
May not be combined with any other discounts or special offer. Not applicable to previous purchases.

DYK-5-A

Please see the sample coupon to be used with CLOSED account Did-You-Know (Sample B) card below:

Closed Account

Epecially for: _____

Receive \$100.00 OFF any non-advertised fine jewelry purchase of \$299.95 or more with this certificate.

Daniel's

Authorized by: _____
Expiration Date: _____

Excludes advertised sale items, watches, special order items and Millennium Diamond purchases.
May not be combined with any other discounts or special offer. Not applicable to previous purchases.

inE-5-B

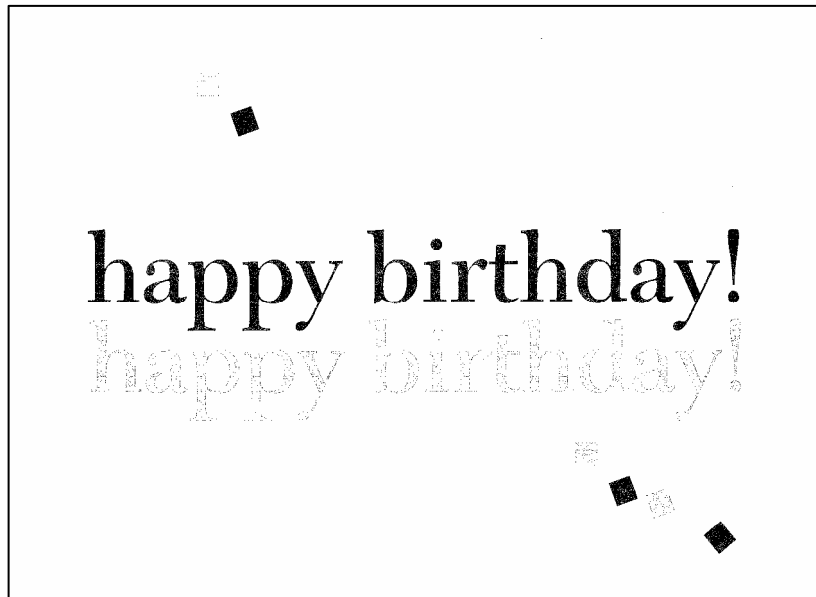
BIRTHDAY MAILING CARDS & INVITATIONS

The company provides pre-printed Birthday cards and promotion invitations for use when targeting birthday customers (POS 132N & 132C reports).

There are slots in these cards for associates to insert their business cards.

Please see the below examples of a customer Birthday card and party invitation.

Birthday card:



Birthday invitation:



CHAMPAGNE MAILING CARDS

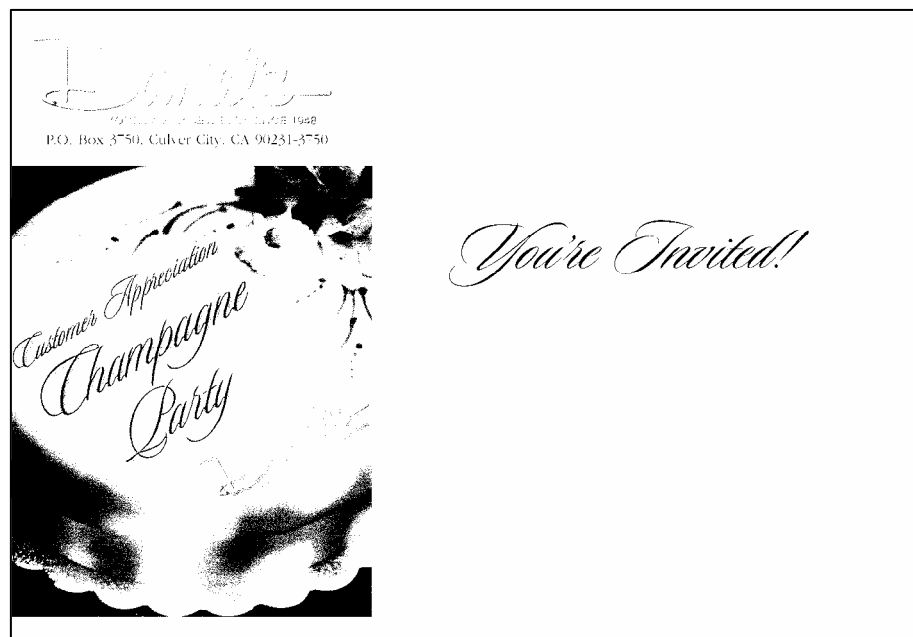
The company provides a CHAMPAGNE PROMOTIONAL PACKAGE for stores who want to create a promotion to invite customers in their store.

This package includes:

1. The CHAMPAGNE PARTY INVITATION (*see sample below*):



2. The CHAMPAGNE PARTY ENVELOPE (*see sample below*):



CHAMPAGNE MAILING CARDS (Cont.)

5. CHAMPAGNE Party Special Value Coupons (see example below):

Your Champagne Party Bonus!

GET UP TO \$100.00 IN FREE JEWELRY!

- Buy a \$99 item, choose any \$20 item **FREE!**
- Buy a \$299 item, choose any \$50 item **FREE!**
- Buy a \$499 item, choose any \$75 item **FREE!**
- Buy a \$999 item, choose any \$100 item **FREE!**

(Includes Advertised Sale Items!)

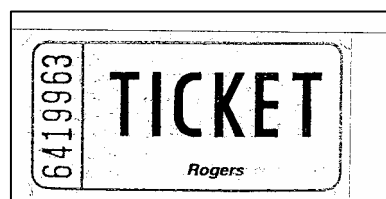


Daniel's
YOUR FAMILY JEWELER SINCE 1948

Not valid with any other coupon or special offer.

<div style="background-color: #4b4b9b; color: white; text-align: center; padding: 5px; margin-bottom: 5px;"> <p><i>Champagne Party</i></p> <p>SPECIAL VALUE COUPON</p> </div> <p style="text-align: center;">FREE RING CLEANING & INSPECTION</p> <p style="font-size: x-small;">To keep your jewelry looking it's best—and to protect the value of your investment—it is wise to have it cleaned and inspected for wear on a regular basis. Bring your rings with you during our Champagne Party and we'll clean and inspect them free of charge.</p> <div style="text-align: center; margin-top: 20px;">  <p>Daniel's YOUR FAMILY JEWELER SINCE 1948</p> </div>	<div style="background-color: #4b4b9b; color: white; text-align: center; padding: 5px; margin-bottom: 5px;"> <p><i>Champagne Party</i></p> <p>SPECIAL VALUE COUPON</p> </div> <p style="text-align: center;">SAVE 30% ON A NEW WATCH BATTERY</p> <p style="font-size: x-small;">Ask about our 10 Year Watch Battery Replacement Program.</p> <p style="font-size: x-small;">Present this coupon and we'll replace your watch battery for only \$6.99. Installation included. A regular \$9.99 value.</p> <div style="text-align: center; margin-top: 10px;"> <p>REG. \$9.99</p> <p>\$6⁹⁹</p> <p>with coupon</p> </div> <div style="text-align: center; margin-top: 20px;">  <p>Daniel's YOUR FAMILY JEWELER SINCE 1948</p> </div> <p style="font-size: x-small;">Limit one battery. Some watches excluded. Not valid with any other coupon or special offer.</p>
<div style="background-color: #4b4b9b; color: white; text-align: center; padding: 5px; margin-bottom: 5px;"> <p><i>Champagne Party</i></p> <p>SPECIAL VALUE COUPON</p> </div> <p style="text-align: center;">FULL TRADE-IN VALUE ON YOUR OLD JEWELRY</p> <p style="font-size: x-small;">Bring in the old diamond jewelry you no longer wear (whether purchased from us or not) and we'll give you its FULL TRADE-IN VALUE toward your new diamond jewelry purchase!</p> <div style="text-align: center; margin-top: 20px;">  <p>Daniel's YOUR FAMILY JEWELER SINCE 1948</p> </div>	<div style="background-color: #4b4b9b; color: white; text-align: center; padding: 5px; margin-bottom: 5px;"> <p><i>Champagne Party</i></p> <p>SPECIAL VALUE COUPON</p> </div> <p style="text-align: center;">MANAGER'S SPECIALS UP TO 68% OFF!</p> <p style="font-size: x-small;">Present this coupon to take advantage of our Manager's Champagne Party Specials throughout the store and SAVE UP TO 68% OFF THE REGULAR TICKETED PRICE on selected diamond, gemstone and gold jewelry.</p> <div style="text-align: center; margin-top: 20px;">  <p>Daniel's YOUR FAMILY JEWELER SINCE 1948</p> </div>

6. RAFFLE TICKET (see example below):



BRING A FRIEND


The "Bring a Friend" program encourages 'word of mouth' advertising and increases sales by rewarding both the current Daniel's customer and the customer's friend when the friend opens an account and makes a purchase.

The program offers:

- The friend receives \$10 off the first purchase of over \$99 on their new Daniel's charge, and a \$25 gift certificate for our existing customer (*see POS Manual p. 49 or 50*). Place used "Bring A Friend" card in the customer's "S" file.
- The existing customer receives a \$25 gift certificate from the store manager once the friend opens an account and makes the qualifying purchase (*see POS Manual p. 49 or 50*). Staple endorsed certificate to the white copy of the POS receipt. The pre-printed un-issued gift certificates should be in the designated envelope inside the safe lockbox. When a certificate is issued, the Manager/ Keyholder should fill out the outside of the envelope with the requested information about the customer and this transaction.

Pictured below is a sample of a Bring a Friend card and a gift certificate.

Bring a Friend Card:

<p style="text-align: center;">BRING A FRIEND!</p> <p>Some of our very best customers are here at Daniel's. And because of that, we have a special "introductory" offer that's worth some money to both you and a friend!</p>  <p style="text-align: center;">Here's how it works.</p> <p>First, introduce a friend to Daniel's Jewelers. When your friend opens a Daniel's Charge, we'll give him or her \$10 off their first purchase of \$99 or more, and we'll give you a \$25 gift certificate to use on anything in the store! Pretty friendly offer, right?</p>	<p style="text-align: center;">HERE'S ALL THERE IS TO IT:</p> <p>Complete the information below. Then have your friend present this invitation to one of our sales associates. When your friend opens a Daniel's Charge, you'll be paid.</p> <p style="text-align: center;">This is to introduce my friend,</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">(please print friend's name on this line)</p> <p style="text-align: center;">whom I recommend for a Daniel's Charge Account.</p> <p>My name: _____</p> <p>Address: _____</p> <p>City: _____ State: _____ Zip: _____</p> <p>Account #: _____ Phone: () _____</p>
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Gift Certificate:

 <p style="font-size: small;">SKT #742-00000</p> <h2 style="margin: 0;">Bring a Friend Gift Certificate</h2>	
<p><i>This \$25.00 "Bring a Friend" Merchandise Gift Certificate is issued to Daniel's Preferred Charge Customer: _____ because your Friend _____ opened their new Daniel's Account # _____ with a purchase over \$99.00 on _____ (Date)</i></p> <p style="font-size: x-small;">This Merchandise Gift Certificate is applicable towards the purchase of \$25 in merchandise at any Daniel's Jewellers Southern California store. If you spend an amount for more than \$25, the \$25 value of the Certificate will be deducted from the price of the merchandise selected. This Certificate has no cash value and may not be used for a payment or item charged on an account or applied against a future purchase or any previous purchase. Valid only to person named herein.</p>	<p style="font-size: 2em; font-weight: bold;">\$25⁰⁰</p> <p style="font-size: x-small;">VALID 30 DAYS FROM DATE OF ISSUANCE</p> <p style="font-size: x-small;">Issued by Sales Associate _____</p> <p style="font-size: x-small;">Assoc. # _____ DATE ISSUED _____</p> <p style="font-weight: bold; font-size: small;">OPPOSITE SIDE MUST BE ENDORSED FOR CERTIFICATE TO BE VALID.</p>

TELEMARKETING INSTRUCTIONS

When telemarketing before any promotions, the following instructions should be followed:

1. The manager assigns the various parts of the telemarketing list(s) to the associates who will be calling.

Before beginning the phone calling, the manager should review and role-play key points to be covered during telemarketing conversations (see sample scripts, following pages).

2. As calls are made, the telemarketing list should be NEATLY marked to indicate “no answer” and “busy” numbers so these numbers can be called back.
3. Make notes about questions each customer asks, whether or not you have the answer. If a customer asks a question that you do not know the answer to, ask the manager or another associate for assistance. It is OK to T.O. a phone call, just as you would T.O. a sale.
4. See sample telemarketing scripts on the following pages.
5. Listed below are the three questions most commonly asked during telemarketing calls and their correct answers:

Question: **“How much is my credit limit?”**

Answer: **“We don’t have a pre-set spending limit! Just come in the store and pick out whatever you like, and we’ll work out all the details while you wait!”**

Question: **“Will I need down payment?”**

Answer: **“It all depends. You may need some down payment, depending on how your credit is and how much you want to buy, but don’t worry about it! We’ll work it all out when you come into our store.**

Question: **“Can I buy (a specific piece of merchandise in the mailer)?”**

- OR -

“How much down payment will I need for (a specific piece of merchandise in the mailer)?”

Answer: **“Don’t worry about it. You may need some down payment, depending on how your credit is, but we’ll work it all out when you come into our store.**

TRUNK SHOW

SUGGESTED TELEMARKETING SCRIPT

The script below is a sample of the phone call store managers and associates should be making to customers about upcoming TRUNK SHOWS. The sample script is an example only and does not need to be followed word-for-word.

Associates and managers should make conversation with customers, not read to them.

Example:

Hello, may I speak with _____?

Hi! This is _____(your name) and I'm calling from Daniel's Jewelers in _____ (location) to invite you to a great one-day clearance sale we're having tomorrow.

You are one of our valued Preferred Charge customers and we'd like to personally invite you to save up to 65% on selected merchandise. AND, just for coming in, we will give you a _____ (free gift).

Also, because of your fine credit history, you have been pre-approved to add _____ (amount) to your account). ("A" & "B" customers – No money down; "C" customers – Some down payment likely required.)

I've set aside the _____ (free gift) just for you, so be sure to come in _____ (tonight, tomorrow, etc.) to our _____ (location) store and ask for _____ (your name). I'm looking forward to seeing you.

INSTA-CREDIT APPLICATION SUGGESTED TELEMARKETING SCRIPT

The script below is a sample of the phone call store managers and associates should be making to customers about upcoming INSTA-CREDIT APPLICATIONS. The sample script is an example only and does not need to be followed word-for-word.

Associates and managers should make conversation with customers, not read to them.

Example:

Hello, may I speak with _____?

Hi! This is _____(your name) and I'm calling from Daniel's Jewelers in _____(location). Your application for a Daniel's Jewelers Preferred Charge Credit Card has been approved! We have a wonderful _____(free gift) waiting for you, just for coming into our store and opening your account.

When you come into the store, we want you to see our exciting selection of fine jewelry. And, when you open your account, the _____(free gift) is yours absolutely free!

Be sure and tell one of our associates that you mailed in your application and that you and I have talked. Your application number is _____ and having this number helps us located your application.

We hope to see you very soon.

TRUNK SHOW INVENTORY MANAGEMENT CHECKLIST

This checklist should be completed during each Trunk to assist with completing the procedures that will maintain an accurate store inventory during the event.

Picture below is a sample of the Trunk Show Inventory Management Checklist.

TRUNK SHOW INVENTORY MANAGEMENT CHECKLIST			
DATE:	Person Running Trunk:	Arrived At Store	Left The Store
TRUNK #	Store Manager:	AM	PM
STORE #		AM	PM

BEFORE STORE OPENS		INITIAL WHEN COMPLETED	
		MGR	TRUNK
Store Manager & Person Running Trunk:			
1.	Plug in GPS charger & put out tray(s) for sales tickets.		
2.	Provide highlighter to Store Manager & each associate.		
3.	Transfer Free Gifts to store. Store Manager verify and signs transfer acknowledging receipt of customer free gifts.		
Store Manager:			
4.	Ensure that any merchandise in the pending/hold merchandise drawer was returned to the display case when the store was closed the night before.		
5.	Complete AM count on Free Gifts Inventory form.		
6.	Remind each associate to:		
	a. Highlight each sales ticket with Trunk item; and		
	b. Write a 'T' next to the SKU of each Trunk item; and		
	c. Tape the Trunk and other tags to the sales ticket; and		
	d. Record every Free Gift on a sales ticket and on POS with the name of the customer that received it; and		
	e. Not remove any Trunk item from a display case to put on hold unless the customer is present and the sale has been submitted to Credit for an approval; and		
	f. Give the Mgr the SKU for any Employee purchase before 2:00pm or it can't be purchased from the Trunk.		
	g. Trunk merchandise not removed from the case for an employee purchase until (a) the purchase price for the item is known, & (b) the store manager has completed both an employee purchase sales ticket and a transfer from the store to 1EM for the item, & (c) the employee has either paid the store manager for the item (cash, check, credit card) or the store manager has submitted a request to Credit for a payroll deduction account purchase, and (d) the employee must have decided to buy the item.		

***When complete, fax to Loss Prevention (310) 665-2141 and
Staple to Free Gifts Count Sheet & put in Operations Drawer File 3 (Case Cts)***

TRUNK SHOW INVENTORY MANAGEMENT CHECKLIST (Cont.)

DURING THE DAY:

Store Manager:	MGR	TRUNK
7. Store Manager should ensure that morning 'Reminders' are properly done by each associate.		
Store Manager & Person Running Trunk:		
8. Conduct a mid-day count to balance (a) the number of Trunk items that are no longer in a display case since the store opened (Person running Trunk determines) with (b) number of Trunk items listed on a sales ticket and sold or that are in the pending drawer for employee purchase or Credit pending sale (Store Manager determines). a. Each total must balance with the other. b. Any discrepancy must be resolved or reported immediately to the Regional/District Manager and Loss Prevention. c. <i>Mid-day count is optional depending on how busy it is.</i>		

AFTER STORE CLOSES

Store Manager:		
9. Store Manager completes PM count on Free Gifts form.		
10. Store Manager removes all merchandise from pending drawer and returns it to display cases.		
Store Manager & Person Running Trunk:		
11. Person running trunk determines if any Trunk item not sold on POS should be left in the store for the customer to pick up.		
12. Verify Trunk items sold (see 8 above for procedures) a. Each total must balance with the other. b. Any discrepancy must be resolved. If item appears to be missing, this must be immediately reported to the Regional/District Manager and Loss Prevention.		
13. Complete a transfer to the store for each Trunk item that was sold or given away to a customer. Store Manager should verify and sign.		
14. Complete a separate transfer to the store for each Trunk item being held for a future sale to a customer or to a store employee. a. Next to each employee sale item write "1EM" & the employee's name & employee #. b. Next to each item being held for a customer write "Held by" & the employee's name & number with the customer's name. c. Store Manager verifies each SKU number is correct, paperwork is completed for each employee purchase, & there is a Credit approval or 20% deposit for each held customer sale before signing the transfer.		

TRUNK SHOW INVENTORY MANAGEMENT CHECKLIST (Cont.)

INVENTORY FORM Free Gifts - Trunk Show Day

STORE # _____ DATE: _____

FREE GIFT SKU	STORE QTY - AM	STORE QTY - PM	AM-PM DIFF	# SOLD ON POS
329-00318				
550-00379				
550-01267				
550-01739				
550-01895				
550-01903				
550-02125				
550-02323				
550-02489				
550-03040				
550-03073				
550-03099				
550-03248				
550-03255				
550-03263				
550-03271				
550-03289				
550-03297				
550-03305				
550-03313				
550-03321				

*When completed at the end of the Trunk show, fax to Loss Prevention (310) 665-2141. Then
Staple to Inventory Mgmt. Checklist & put in Operations Drawer File 3 (Case Cts).*