



34 Ways Trax® Helps You Beat the Recession

By Joe Capillo, retailer, author, consultant

I've been using and recommending Trax® for over a decade. I wouldn't operate a retail furniture store or without it because I believe deeply that we lose more sales due to poor performance and weak follow up than for any other reasons. This is fixable *if you know your metrics* – and only then.

Trax® helps develop the one thing that I find missing most in retailers' relationships with their salespeople – accountability for performance. Also, Trax® helps sales managers do the one thing I believe they need to do more of – coach down the line, in the game, right in there with salespeople and customers. Trax shows exactly where training and coaching is needed most.

Everything in our kind of retailing begins with customer traffic – it's the one metric you *have* to know because it begins the cycle of performance. No other traffic counting system does what Trax® does for retail furniture stores, and it's high time we all got a lot better at what we do – or this recession will be deadly for a lot of independent retailers. To get better fast – start with Trax®.

The Visual Proof/Traffic Counter System – What You Don't Measure You Cannot Improve

1. The truth about your store traffic. No more guessing or doubt as to your real advertising effectiveness. Decisions made based on bad information are bad decisions. Actions taken based on these decisions are usually off-base and don't produce the results you really want. You'll see every customer opportunity and every non-customer coming through your doors. Can't get any more accurate than that.
2. The benefit of knowing this for all your stores, no matter how remote from your headquarters location without having to depend on biased, incorrect personal reporting by people who have a stake in traffic being down.
3. Timed traffic counts. Understanding scheduling and staffing requirements requires monitoring your traffic by hourly segments as well as by days. Trax does it all for you. The management system lets you or your managers adjust hourly numbers for non-customer traffic, so you can be 100% accurate all the time.
4. You'll know in a short time whether traffic is trending down, up, or is flat.
5. You'll know what is really happening from month to month, and in the 13th month after installing the Visual Proof system you'll be able to compare real, accurate counts year-to-year.
6. You'll know whether sales are traffic-driven or performance driven – a critical strategic metric to know for decision-making.
7. You'll receive over a dozen traffic reports including one that tells you when you have been understaffed based on traffic counts and the number of salespeople present and logged into the Trax UpBoard.

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8. You can monitor your stores from anywhere you can access the internet and see today's traffic in your stores within 1 hour.
9. You can access all traffic reports in the same way – anytime from anywhere

The Trax® Electronic Upboard

10. Accountability for every customer your salespeople engage
11. Trax® automatically operates your salesperson rotation (Up) system moving people from “Available” status to “On the Floor” status with a simple click. This also starts the clock.
12. Your sales managers can adjust the rotation as required.
13. Trax® maintains records on the number of hours your salespeople are logged into the system.
14. You'll be able to match hourly and daily entries by salespeople to your hourly and daily Visual Proof Counter numbers.
15. You can see customer activity for the day in almost real time from anywhere in the world that you can access the internet.
16. Sales managers can monitor the accountability of salespeople in real time by accessing the UpBoard online at any time to ensure salesperson compliance with your requirements.
17. For each customer engaged by your salespeople today, you will see four important pieces of information: a. what brought them in today, b. what they were shopping for, c. what were the results, and why a sale was not made today.
18. You can also see all notes regarding the interaction that are entered into the system by salespeople regarding each customer engagement.
19. Trax® automatically maintains sales performance data for reports that accumulate all necessary data to show you, on demand, your salespersons' month-to-date (or any period you define) sales performance for coaching. You get to choose what appears on your Performance Summary Report, but included are the following:
 - a. Number of customer Opportunities
 - b. Number of sales made
 - c. Close ratio
 - d. Average sale - overall
 - e. Revenue per Up
 - f. Cumulative sales volume
 - g. Number of be-back Opportunities
 - h. Percentage of be-backs to total
 - i. Sales volume to be-back customers
 - j. Average sale to be-back customers
 - k. Number of be-back sales and average sale
 - l. Number of house call sales
 - m. Number of room sketches completed (optional but included)
 - n. Sales made from sketched rooms (optional but included)
 - o. Closing Ratio Analysis for house call opportunities and sketched opportunities.
 - p. Warranty sales and close ratio
20. Trax® maintains a customer file of all transactions by salesperson to record contact information and notes concerning each engagement
21. Trax® maintains an action calendar for each salesperson allowing them to schedule follow up actions with your customers

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22. The calendar generates and automatically prints daily To-Do lists for each person based on entries in their calendars and gives a copy of each list to your sales managers for oversight and coaching.
23. The UpBoard tracks and reports the average time your salespeople spend with customers – a critical element in staffing, scheduling, and coaching for improved performance.
24. The UpBoard provides reports showing your “opportunity sales” due to your salespersons’ range of performance in close ratio and average sale – the two factors in the sales equation that are most dependent on how they work with customers – their selling skills. These reports show you where training and coaching is needed.
25. Trax® servers store all your data for retrieval on demand from archive files so you can see historical data from past years and compare your current with past performance in all key performance areas.

Trax® Goals Management

26. **Goals are the most critical strategic management variable.** Nothing you do is more important than successfully managing goals. Trax® handles sales performance monitoring and goals comparison reporting like no other system. You can use your financial goals for written sales, **and** your salespeople’s personal goals at the same time!
27. Trax® automatically tracks and reports the daily progress on an individual salesperson basis against goals. The daily individual performance letter automatically prints in the overnight cycle and lets you, your managers, and each individual know exactly where they are now versus where they should be in the month. Goals management is a 12-step program for your business where you make your goals for sales and profits one month at a time.
28. Trax® allows you to make adjustments to goals along the way and provides valuable information for managers to use in coaching to keep their people on target for their own personal income goals.

CRM – The Battle for Customer Retention

Trax is a Customer Relationship Management system. There is widespread belief among marketing experts that in the immediate future as global companies and online marketing takes further hold of our economy; the struggle for traditional retailers will be to retain their old customer base and attract and retail the new generations moving through the economy.

29. Trax® provides an electronic file for all a salesperson’s customer opportunities – whether sold or unsold. This is an automatic result of inputting information about each customer opportunity a salesperson is assigned.
30. By asking all sold customers what their next project is likely to be and when they plan to do it is one way to assure your store is there first with the right offer at the right time. Trax® lets you do this easily.
31. You can use Trax® as your be-back customer follow up system for current unsold consumers who have visited your store and been served, but require a second visit to complete their purchase. Trax® data shows that be-back customers purchase over 70% of the time – that’s why we track them by salesperson. The system allows all such follow up to be out in the sunshine for managers to oversee and salespeople to perform.

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32. The weakest area for most furniture salespeople is maintaining active customer files; a source to be tapped when traffic declines and normal advertising and marketing fail to perform – such as now in 2009. Trax® provides not only a place to record these customers' contact information, but a way to contact them at the right time.

My Two Most Favorite Reasons for Using Trax®

33. The discipline of accountability for performance is critical to high-performance organizations. Salespeople in all one-to-one selling environments owe the owners of the company that employs them, and provides all customer traffic, an accounting for each customer opportunity they receive. Trax® is the one system custom designed for the retail furniture business that does all the right things.
34. With over \$3 million invested in programming, no self-designed spreadsheet-based system can do what Trax® does from simple, single point data entry. I like it because no valuable management time, programming time, or development time is required on the retailer's part to achieve the absolute best in information gathering.