



Independent Advisory Practice of
Wolfe Integration Systems, LLC
 INDEPENDENT TECHNOLOGY • DATA • AI ADVISORY FOR HOME FURNISHINGS RETAILERS

AI-Informed Shopper Sales Readiness Checklist

Evaluate whether your sales process is built for shoppers shaped by search, reviews, comparisons, and AI summaries.

THE WRA™ EXECUTIVE TOOLKIT — VOLUME 1: RETAIL GROWTH DIAGNOSTICS | ASSESSMENT 2 OF 3
 WRA-101 Technology Ecosystem Scorecard | WRA-102 AI SALES READINESS CHECKLIST | WRA-103 Customer Reactivation Worksheet

EXECUTIVE INSIGHT

Today's furniture shopper often arrives having already researched products, compared retailers, and consulted AI tools before ever speaking with an associate. This checklist helps you evaluate whether discovery, financing conversations, and follow-up are built for how customers actually buy today.

Estimated completion time: 10 minutes

THE WOLFE RETAIL GROWTH FRAMEWORK™

MEASURE → ANALYZE → PRIORITIZE → IMPLEMENT → OPTIMIZE

RECOMMENDED PARTICIPANTS

- Owner
- Sales Manager
- Store Manager
- Sales Associates
- Marketing Director
- Training Lead
- Operations
- HR

Use this worksheet with sales managers, store leaders, and associates.

STORE / TEAM

COMPLETED BY

DATE

1. CUSTOMER ARRIVAL

CHECKED ___ / 4

- Do associates ask what the customer has already researched?
- Do associates ask which retailers, products, or options the customer is comparing?
- Do associates ask what search, reviews, or AI tools led the customer to believe?

- Do associates identify the remaining decision barrier before presenting more product?

INDUSTRY BENCHMARK

Top-performing sales teams consistently ask customers what they researched online before beginning product recommendations.

2. DISCOVERY

CHECKED __ / 3

- Discovery starts with the customer's journey, not only room, style, and budget.
- Associates clarify decision-makers, timing, delivery concerns, financing concerns, and confidence level.
- Associates know how to validate a customer's research without sounding defensive.

3. FINANCING AND PAYMENT

CHECKED __ / 3

- Financing is introduced consistently and compliantly.
- Associates can explain payment options without pressure or confusion.
- Common objections are practiced before the customer raises them.

4. FOLLOW-UP

CHECKED __ / 4

- Every be-back customer receives same-day follow-up.
- Follow-up references the actual conversation, not a generic template.
- Associates document the next step, open question, and timing.
- AI is used only to draft and organize follow-up; the associate verifies every claim.

5. MANAGER COACHING

CHECKED __ / 3

- Managers review be-back follow-up quality weekly.
- Managers inspect conversion, traffic, and Revenue Per Opportunity together.
- Managers coach the process, not just the outcome.

TOTAL CHECKED

___ / 17

Next Step

If three or more boxes are unchecked, your team may benefit from **AI for Furniture Sales Associates** — a live, practical training built specifically for furniture retail.

Manager Debrief

Manager Observations

1. Immediate Coaching Priority

2. Immediate Coaching Priority

3. Immediate Coaching Priority

OVERALL READINESS

- Ready Mostly Ready Needs Coaching Immediate Attention

RECOMMENDED FOLLOW-UP

- Training Coaching Process Improvements Technology
- Executive Review

WRA Executive Score

ASSESSMENT SCORE

Your Organization Currently Fits Here

- Emerging Developing Mature Industry Leader

What Happens Next?

Once you've completed this AI Sales Readiness Checklist, here's what to expect:

1. Email your completed assessment.
2. We'll review it before your call.
3. Receive a customized executive scorecard.
4. Meet for a 30-minute strategy session.
5. Receive a practical 90-day action plan.

No software sales. No vendor commissions. Just practical advice.

Email your results: sales@wolfeintegrationsystems.com

Book your free call: wolfeintegrationsystems.com/#strategy-call



**Schedule Your Executive
Strategy Review**
Scan Here

Meet Your Advisor

Dr. Todd Wolfe

Founder & Principal Advisor

Helping Home Furnishings Retailers Turn Technology Into Revenue

Independent advice. Practical roadmaps. Measurable business outcomes.

Dr. Wolfe brings 25+ years leading enterprise technology, AI, data, and software engineering, including 15+ years advising home furnishings retailers on turning technology into revenue. He is an independent advisor with no software commissions and no vendor bias.

Learn more: wolfeintegrationsystems.com