



Independent Advisory Practice of
Wolfe Integration Systems, LLC

THE WRA™ EXECUTIVE TOOLKIT

VOLUME 1

RETAIL GROWTH DIAGNOSTICS

Helping Home Furnishings Retailers Turn Technology Into Revenue

PREPARED BY

Dr. Todd Wolfe

Founder & Principal Advisor

INCLUDED

- ✓ **WRA-101 Technology Ecosystem Scorecard**
- ✓ **WRA-102 AI Sales Readiness Checklist**
- ✓ **WRA-103 Customer Reactivation Worksheet**

ESTIMATED COMPLETION

30 Minutes



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Independent Advisory Practice of
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INDEPENDENT TECHNOLOGY • DATA • AI ADVISORY FOR HOME FURNISHINGS RETAILERS

Beyond the POS: Technology Ecosystem Scorecard

A diagnostic tool to identify where POS, CRM, traffic, marketing, reputation, and reporting data stop working together.

THE WRA™ EXECUTIVE TOOLKIT — VOLUME 1: RETAIL GROWTH DIAGNOSTICS | ASSESSMENT 1 OF 3
WRA-101 TECHNOLOGY ECOSYSTEM SCORECARD | WRA-102 AI Sales Readiness Checklist | WRA-103 Customer Reactivation Worksheet

EXECUTIVE INSIGHT

Retailers rarely lose sales because they lack software. They lose sales because customer data, sales processes, follow-up, reporting, and AI aren't working together. This assessment helps identify where revenue is leaking — and where the fastest improvements can be made.

Estimated completion time: 10 minutes

THE WOLFE RETAIL GROWTH FRAMEWORK™

MEASURE → ANALYZE → PRIORITIZE → IMPLEMENT → OPTIMIZE

RECOMMENDED PARTICIPANTS

- | | | | |
|---|-------------------------------------|------------------------------|--|
| <input type="checkbox"/> Owner | <input type="checkbox"/> President | <input type="checkbox"/> COO | <input type="checkbox"/> Sales Manager |
| <input type="checkbox"/> Marketing Director | <input type="checkbox"/> Operations | <input type="checkbox"/> IT | <input type="checkbox"/> Store Manager |

How to use this scorecard: Score each area from 1 (unclear or disconnected) to 5 (reliable, visible, and managed). Be honest rather than aspirational — this tool is only useful if the score reflects reality today.

COMPANY / STORE

COMPLETED BY

DATE

1. POS AND CUSTOMER DATA

SCORE ____ / 5

- Customer records are clean and searchable.

- Quotes, sales, service, and delivery status can be connected to the customer.
- Duplicate customer records are actively managed.

NOTES / EVIDENCE

2. CRM AND FOLLOW-UP

SCORE ____ / 5

- Leads are routed quickly and visibly.
- Follow-up is consistent by store and associate.
- CRM activity can be connected back to sales outcomes.

NOTES / EVIDENCE

3. TRAFFIC AND CONVERSION

SCORE ____ / 5

- Showroom traffic is measured consistently.
- Conversion and Revenue Per Opportunity are reviewed with context.
- Traffic, CRM, and POS data can be reconciled.

NOTES / EVIDENCE

4. DIGITAL VISIBILITY AND REPUTATION

SCORE ____ / 5

- Google Business Profile information is accurate.
- Google Reviews, Yelp, and other reputation signals are monitored.
- Website and campaign activity can be tied to meaningful retail outcomes.

NOTES / EVIDENCE

5. REPORTING AND EXECUTIVE DECISIONS

SCORE ____ / 5

- Leadership has one credible view of performance.
- Dashboards explain what happened and what to do next.

- Reports do not require manual spreadsheet reconciliation every week.

NOTES / EVIDENCE

6. AI READINESS

SCORE ____ / 5

- Employees know what information should not be entered into AI tools.
- AI use cases are connected to real workflows.
- Human verification and accountability are clear.

NOTES / EVIDENCE

TOTAL SCORE

____ / 30

WRA Maturity Index™

LEVEL 1 6–14 pts	Emerging	High friction. Start with data quality, ownership, and process clarity before buying more software.
LEVEL 2 15–20 pts	Developing	Meaningful opportunity. Prioritize the gaps affecting revenue, trust, and execution.
LEVEL 3 21–26 pts	Mature	Strong foundation. Focus on optimization and governance.
LEVEL 4 27–30 pts	Industry Leader — Operational Excellence	Best-in-class execution. Focus on scaling advantage and mentoring the organization.

INDUSTRY BENCHMARK

Most retailers score between 16–22 on the Technology Ecosystem Scorecard. Organizations scoring 25+ typically have stronger data visibility, more consistent follow-up, and better executive reporting.



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Executive Summary & Action Plan

Translate your scores into a plan leadership can act on.

Overall summary (2–3 sentences):

Top Three Strengths

1.

2.

3.

Top Three Risks

1.

2.

3.

Quick Wins (Next 30 Days)

Action	Owner	Target Date

Long-Term Projects (90+ Days)

Initiative	Owner	Target Quarter

WRA Executive Score

ASSESSMENT SCORE

Your Organization Currently Fits Here

Emerging Developing Mature Industry Leader

What Happens Next?

Once you've completed this Technology Ecosystem Scorecard, 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

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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.
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3. Receive a customized executive scorecard.
4. Meet for a 30-minute strategy session.
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Customer Reactivation Opportunity Worksheet

Identify and quantify the repeat-purchase, replacement, room-completion, and quote-not-sold opportunities already sitting in your customer data.

THE WRA™ EXECUTIVE TOOLKIT — VOLUME 1: RETAIL GROWTH DIAGNOSTICS | ASSESSMENT 3 OF 3
WRA-101 Technology Ecosystem Scorecard | WRA-102 AI Sales Readiness Checklist | WRA-103 CUSTOMER REACTIVATION WORKSHEET

EXECUTIVE INSIGHT

Most retailers already have the customers they need to grow — they simply haven't reactivated them. This worksheet helps you quantify the repeat-purchase, replacement, and quote-not-sold revenue already sitting in your customer file.

Estimated completion time: 10 minutes

THE WOLFE RETAIL GROWTH FRAMEWORK™

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COMPANY / STORE

COMPLETED BY

DATE

1. CUSTOMER FILE SIZE

How many customers purchased in the last 10 years?

How many have permissioned email or phone contact information?

2. POTENTIAL REVENUE CALCULATOR

Estimate the revenue opportunity sitting in your reactivation-eligible customer file. Formula: Average Sale × Reactivation-Eligible Customers × Response Rate = Potential Revenue.

AVERAGE SALE (\$)

REACTIVATION-ELIGIBLE CUSTOMERS

Response Rate	Customers Reached	Potential Revenue
2%		\$
5%		\$
10%		\$

ESTIMATED ANNUAL REVENUE OPPORTUNITY

\$

If this opportunity represents more than \$250,000 annually, consider scheduling an Executive Strategy Review.

INDUSTRY BENCHMARK

Reactivation campaigns in home furnishings typically see response rates between 2–5%, with higher-touch, personalized outreach performing at the top of that range.

POTENTIAL QUICK WIN

What campaign could you launch in the next 30 days?

3. CATEGORY OPPORTUNITIES

Which customers purchased an anchor item but not likely room-completion categories? Examples:

- Sofa without rug, tables, lighting, recliner, accent seating
- Mattress without pillows, protector, adjustable base
- Dining table without server, stools, lighting, rug

OPPORTUNITY NOTES

4. REPLACEMENT WINDOWS

Which categories may have meaningful replacement cycles? Examples:

- Mattress
- Heavily used upholstery
- Outdoor furniture
- Home office
- Kids or guest room furniture

OPPORTUNITY NOTES

5. QUOTE-NOT-SOLD

How many open or lost quotes are older than 7 days?

How many received documented follow-up?

6. HIGH-VALUE RELATIONSHIPS

Which customers have:

- Multiple purchases
- Higher average order value
- Positive service history
- Financing history
- Referrals or reviews
- Recent email/website engagement

7. TEST CAMPAIGN

Pick one segment:

Define the message:

Define the next step:

Define success:

Reminder

The goal is not more email. The goal is better timing, better relevance, and better sales execution.

WRA Executive Score

ASSESSMENT SCORE

Your Organization Currently Fits Here

Emerging Developing Mature Industry Leader

What Happens Next?

Once you've completed this Customer Reactivation Opportunity Worksheet, here's what to expect:

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