

Project lead follow-up.



Best Practices

1. Concept

Designers are gathering inspiration from sources like Instagram and Pinterest.

Wait a minimum of two weeks.
Follow up with an email that includes inspiring installation images.

2. Schematic design phase

Designers are still gathering inspiration, but refining and editing their choices.

Wait a minimum of one week.
Follow up with an email that includes product images and similar product suggestions. Use Material Desk to create and share boards or palettes.

Project lead follow-up.



Best Practices

3. Design development phase

Designers are developing the details of their design. Information becomes key.

Wait a minimum of one week.

Follow up with an email to offer larger sample sizes, pricing, and environmental info.

4. Specification phase

Project approvals and decisions are being made by the designer and their client.

Contact immediately.

Follow up with an email or phone call to offer lead times and warranty information.

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Best Practices

5. Construction admin phase

The project is in the bid stage.

Contact immediately.

Follow up with an email or phone call to offer installation info and check project timelines for lead-time updates.

6. Reselect/substitutions

The purchaser has found the specified material will not meet the projects requirements, typically due to lead-times, budget constraints, or discontinued items.

Contact immediately.

Follow up with a phone call and email to offer help with shorter lead time/in-stock materials and budget friendly options.

6 tips to master the sales follow-up.



Best Practices

Communicate, clearly



To ensure emails aren't overlooked, create subject lines that directly reference the product, brand, and project.

Make it personal



Including specifics about the samples order is key to encouraging conversation.

Add more value



Designers are more likely to respond when reps provide new information like links to new collections or related products.

Spark inspiration



Be a visual hero with Boards and Material Desk! Create a palette that features the product sampled and share it with the designer.

Limit the questions



Too many project questions become overwhelming and can feel needy. Limit the ask and focus on adding value.

Project phase matters



Pay attention to the noted project phase and follow up accordingly.