FOR JEWELERS WHO TAKE CUSTOM CONSULTS

How to follow up on every open ring consult without pestering anyone

A sheet that runs in your browser. List open consults once and see which ones have waited past your window.

> List each open consult by first name or job label with the consult date and the date of your last follow up. Pick a window in days. Anything past the window gets one short note that refers to the consult.

PRINT VERSION

Paper sheet

CONSULT (FIRST NAME OR JOB LABEL)	CONSULT DATE	LAST FOLLOW UP	NEXT NOTE ON

FOLLOW UP NOTE

Template that refers to the consult

Hi _____, thanks again for coming in about the _____. I am here if you have questions about the design. Would you like to set a time to look at it again?

EXAMPLE WORDING ONLY

Keep metal, stone and value details out of templates and check each one yourself before it goes out. This sheet is not legal advice.

WHAT THIS SHEET LEAVES FOR YOU

Writing each follow up while a customer waits at the counter is still on you.

PR MODE sets up consult and quote follow up drafts for your shop. You approve every note. Read the jeweler workflows.