# CRITELLI'S FINE FURNITURE & RUGS | CRITELLI'S MODERN

## An eXperience Management Customer Story

*How Critelli Furniture Modernized Customer Experience Without Losing the Human Touch*

# Executive Summary

This story explores how Critelli transitioned from fragmented, notebook-based selling to a unified, purpose-built Customer eXperience Management (CXM) system from PerformNOW. The result: clearer pipeline visibility, stronger follow-up discipline, higher close rates, and a scalable foundation for repeat business without disrupting how designers work.

# The Legacy Challenge: High-Touch Sales, Low Visibility

Critelli specializes in medium to high-end, highly customized home design projects. More than 80% of sales involve customization, multiple visits, and ongoing collaboration. Deals rarely close on the first visit—and that is intentional.

Historically, this process lived in individual sketchbooks. Some designers were meticulous. Others less so.

From a management perspective, this created blind spots:

- Opportunities relied on memory rather than process
- Follow-up quality varied by individual
- Pipeline value was difficult to see in real time
- Leads could quietly disappear during long decision cycles
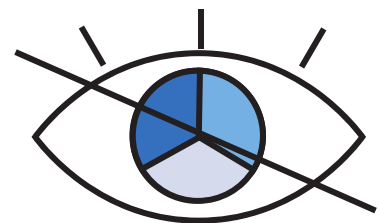
As foot traffic softened and buying journeys lengthened, these gaps became increasingly costly.

> **"If everyone could remember everything perfectly, we wouldn't need a system. But ultimately, the owner is responsible for every customer—no matter who started the relationship."**
>
> Julia Critell

👉 Watch the full video: https://www.performnow.com/experience-management-critelli-furniture/

# Why Generic CRMs Fell Short

Like many retailers, Critelli had tested digital tools before. Most failed for the same reasons: they were too complex for design-driven teams, built for generic sales models, and poorly suited for multi-visit, appointment-based furniture selling.

PerformNOW CXM was different. Customized specifically for furniture retailers, it aligned with Critelli's real-world sales process instead of forcing behavioral change.

# The PerformNOW CXM Approach

Critelli implemented PerformNOW CXM with a simple principle: support existing behavior first, then improve visibility and consistency.
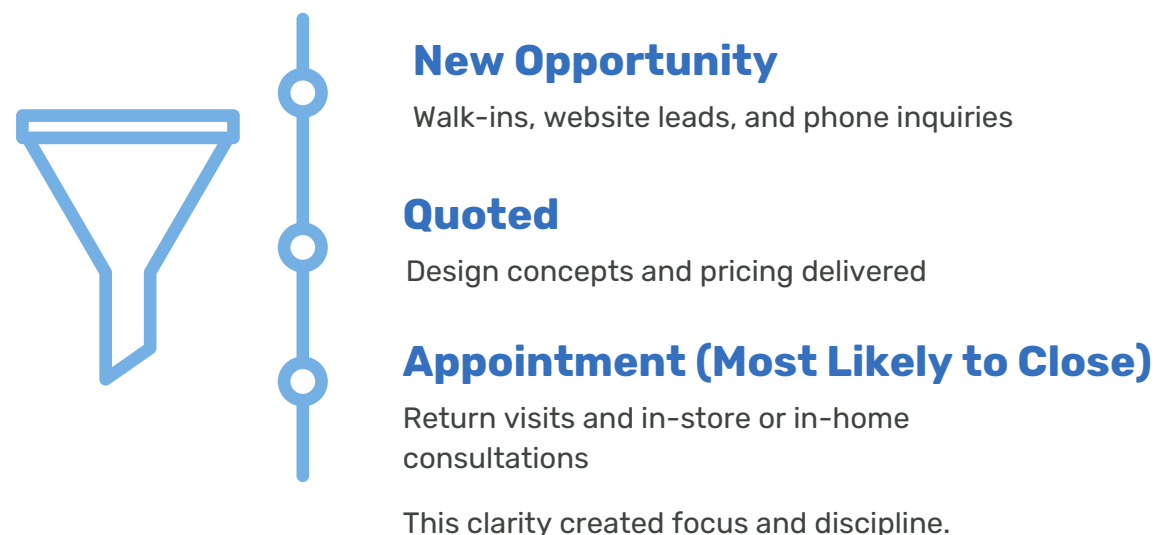
Sketchbooks stayed.
What changed was what happened after the interaction.

Designers now enter customer information into PerformNOW CXM once the visit is complete, creating a shared system of record for management without interrupting the creative process.

# A Simplified Pipeline That Drives Results

Rather than over-engineering the system, Critelli customized a three-stage pipeline that mirrors how they actually sell:

## New Opportunity

Walk-ins, website leads, and phone inquiries

## Quoted

Design concepts and pricing delivered

## Appointment (Most Likely to Close)

Return visits and in-store or in-home consultations

This clarity created focus and discipline.

> **"We don't sell on the first visit. We sell on the third, fourth, fifth visit. The pipeline helps us stay disciplined until that happens."**
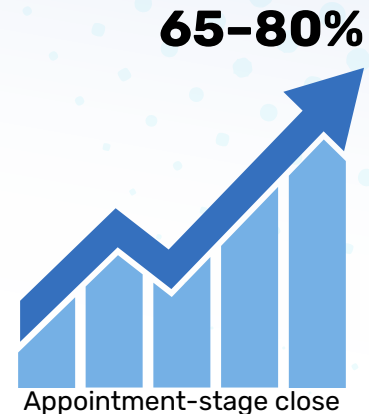
Julia Critelli

👉 Watch the full video: https://www.performnow.com/experience-management-critelli-furniture/

# The Impact: Visibility, Focus, Higher-Close Rates

With PerformNOW CXM in place, Critelli's gained immediate operational benefits:

- ☑ Appointment-stage close rates of 65–80%
- ☑ Clear visibility into open opportunities and total quote value
- ☑ Improved accountability across designers
- ☑ Consistent follow-up throughout long buying cycles

Sales managers can now instantly answer critical questions: How many appointments are open? Which opportunities are stalled? What is the total value in play?

**65–80%**

Appointment-stage close

> "We can see 12 appointments and $100,000+ in potential value. That changes how we manage the business."

Julie Critelli

# Automation That Supports Booking Appointments

Critelli intentionally started small with automation. Their first priority was appointments. Using PerformNOW CXM's scheduling and messaging tools, clients now receive automatic confirmations for in-store and in-home visits—simple, professional, and reliable.

From there, the roadmap expands:

- Stage-based messages as customers move through the pipeline
- Post-purchase and anniversary follow-ups
- Targeted campaigns for rugs, design services, or events

> "The sky's the limit once the data is captured. Now we can segment and speak to customers who are already warm."

Julia Critelli

👉 Watch the full video: https://www.performnow.com/experience-management-critelli-furniture/

# From Repeat Business to a Repeatable System

With over a century of history, Critelli thrives on referrals and repeat customers. PerformNOW CXM brings structure to what was once informal without adding manual work.

Future opportunities include after-sales pipelines, one-year follow-ups, product-specific outreach, and automated review requests. Each interaction strengthens lifetime value while preserving the personal experience customers expect.

## Looking Ahead: A Fully Integrated Experience



Critelli's long-term vision is a digitally connected journey—from first website visit to long-term relationship.

Planned initiatives include deeper website integration, capturing sketches and inspiration digitally, and tighter alignment across chat, reviews, and messaging.

**"Digitizing the experience doesn't remove the human touch —it protects it."**

Julia Critelli

## Is Your Sales Process Keeping Up?

If your sales process still relies on notebooks, memory, or disconnected tools, it may be time to modernize without losing the personal service your store is known for.

See how PerformNOW CXM helps furniture retailers improve follow-up, increase close rates, and build long-term customer relationships.

👉 Visit performnow.com
👉 Book a demo, email david@performnow.com
👉 Watch the full video: https://www.performnow.com/experience-management-critelli-furniture/

PerformNOW CXM