

# DETAILS

WWW.DETAILSFLOWERS.COM

# THE POWER OF EFFECTIVE TEAM COMMUNICATION



@corrine\_heck

# WELCOME TO MY WEDTALK, FLORAL FRIENDS!

I'm Corrine Heck, PFCI,  
Founder & CEO of  
Details Flowers Software





# EFFECTIVE COMMUNICATION WITH YOUR TEAM IS CRUCIAL

Ensures the creative vision and expectations of clients are clearly understood, leading to success.

Helps in coordinating tasks to ensure everything aligns cohesively.

Fosters a collaborative and supportive work environment.



# DEFINE YOUR MISSION & SET THE RULES EARLY

Weave in your company culture into your customer and employee behaviors.

Define your list of Core Values:

*Passion, Creativity, Courage, Teamwork, Sincerity, Optimism, Empathy, Wildness*

Make sure your team lives and breathes your mission!







# Outline

- EXECUTIVE SUMMARY
- FEATURES & BENEFITS
- MILESTONES & FORECASTING
- COMPETITIVE LANDSCAPE
- MARKET OPPORTUNITY
- TECHNOLOGY OVERVIEW
- MARKETING STRATEGY
- CUSTOMER OVERVIEW
- BUYER'S JOURNEY
- SALES PROCESS
- DETAILS UNIVERSITY
- FLORAL ASSOCIATIONS
- PARTNERSHIPS & SUPPORT
- COMPANY STRUCTURE
- OPERATIONS & PROCEDURES
- CURRENT TEAM
- FUTURE HIRES
- BOARD OF ADVISORS
- PRESS & MEDIA



## 2024 STRATEGIC *Development* PLAN

307 W. Granada Blvd, Ormond Beach, FL 32174

# STRATEGIC PLAN

**Develop a Strategic Business Plan that defines your brand's aesthetic, voice, policies, and other elements, all aimed at ensuring consistency in your approach.**





## Executive Summary

Details is an all-in-one software solution that combines real-time inventory data, streamlined proposal creation, and easy payment collection for wedding and event florists...and helps suppliers forecast demand and build a loyal client base, too. Our florists enjoy many features, including e-signature, recipe design, stem-counting, automatic order generation, invoicing, as well as the ability to share clients' visions through the use of gorgeous world's best florists with the finest suppliers around.

Year end 2021, Details serviced 675 florists in the United States, United Kingdom, Ireland, Jamaica, the West Indies and Zimbabwe. In our 2022 plan, we will be adding approximately 50-75 additional retailers. We will accomplish this via social media, inside sales, trade shows, print publishing and networking events.

Details profits through our monthly & annual subscriptions, sales, partnerships, and data analytics.

### Core Value Propositions

We help florists and event designers accomplish more and Details streamlines proposals, ensures product availability arrangements and simplifies the payment process, helping florists get paid.

- Dynamic, customizable proposals and quick turnaround
- Helping florists Create, Calculate & Close
- Custom Portfolio and Resources
- Calculation of Pricing & Profits with historical tracking
- Excellent Customer Service
- Unifies supply chain for flowers & supplies
- Best practices and Guiding Principles

### Elevator Pitch

Details is a platform that helps florists and designers do more proposals, ensure clients are profitable right down to individual orders, and get paid. It's a proposal support team, an extra hand in the inspiration, all in one app. Easy, Fast, Affordable (FLOWER)



# EXECUTIVE *Summary*



# STRATEGIC PLAN

**Essential Elements:**  
Core Value Proposition  
Elevator Pitch  
Boilerplate  
Mission Statement  
Business Model  
Company Values





## Employee On-boarding Checklist

### Employee Activation Checklist

- Welcome Bag!
- Receive key
- Door Code:
- Gusto
- Policy Review
- Equipment Rental Paperwork

- \*\*\*\*\*
- Connect To Internet

- Gmail/G-Suite
  - Set up Email
  - Set up Footer
- Details Admin Account
- Bio For Website
- Google Calendar
- Grammarly
- HubSpot
- KPI Team Document
- Slack
- Clockify

### Service Team

- Stripe
- Client List
- Capterra
- G2
- Calendly Team
- Ring Central

### Sales Team

- Stripe
- Commission Sheet
- Ring Central

- T-Shirt Size \_\_\_\_
- Hoodie Size \_\_\_\_
- Shoe Size \_\_\_\_

### Admin Team

- Gusto Admin

### Marketing Team

- Stripe
- Instagram
- LinkedIn
- Facebook
- Facebook Group
- Tik Tok
- Later
- Ring Central
- Optimonk (pop-up)
- HubSpot Marketing Tab Permissions

### Support Team

- GitHub (per Rising Empire)
- Zapier
- Grammarly
- Zoom

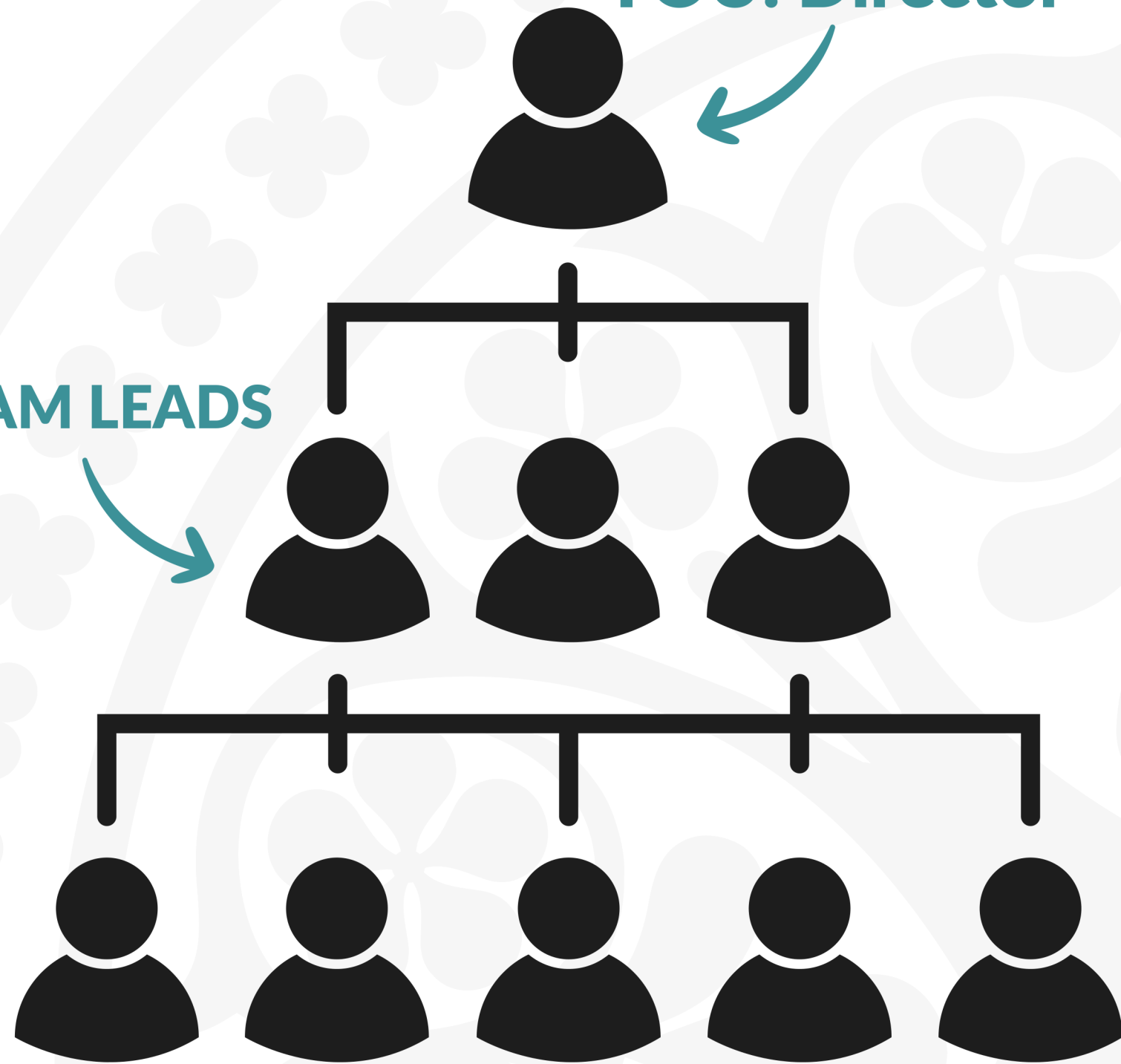
# ONBOARDING

Onboarding documents serve as valuable tools to equip your team with a clear comprehension of their roles, responsibilities, and performance expectations.



**YOU: Director**

**TEAM LEADS**



# ORG CHARTS

**Organizational charts enable the team to visualize the hierarchical structure of management, identify areas requiring assistance, and clarify the specific goals they can strive to achieve.**

**Sales, Marketing, Design Teams**





# MEETINGS

Convening for morning meetings facilitates keeping everyone on the team well-informed across all departments, ensuring a comprehensive grasp of the intricacies that drive the business forward.



**The Details Team during  
a Morning Meeting**





# MEETINGS

## Top Book Recommendations:

- *Traction* by Wickman
- *Death by Meeting* by Patrick Lencioni
- *Meeting Architecture: A Manifesto* by Maarten Vanneste
- *The Lean Startup* by Eric Ries
- *Good Leaders Ask Great Questions* by John C. Maxwell
- *Facilitator's Guide to Participatory Decision-Making* by Sam Kaner





# INTERNAL COMMUNICATION

It's important to keep multiple lines of communication open between team members. Here are a few tools you can use to streamline internal communications.

 Suite

 slack

*Canva*

 Later



 monday.com

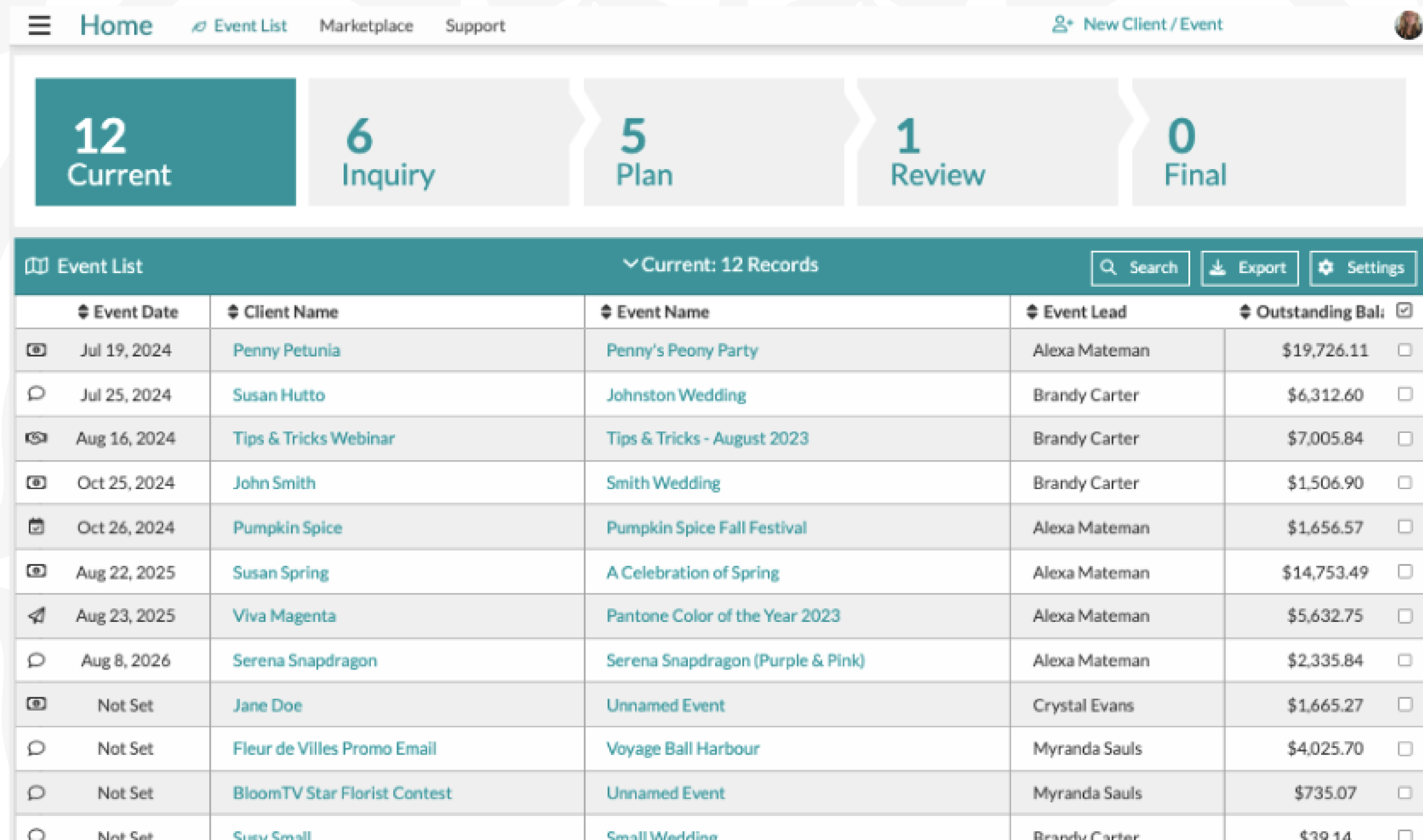
 Trello

 zapier



# COMMUNICATING WITH YOUR TEAM

Leverage the Event List feature in Details to extract event-related data such as the location, making it easily shareable with associates.




Home Event List Marketplace Support New Client / Event

12 Current 6 Inquiry 5 Plan 1 Review 0 Final

Event List Current: 12 Records Search Export Settings

Event Date	Client Name	Event Name	Event Lead	Outstanding Bal.	
Jul 19, 2024	Penny Petunia	Penny's Peony Party	Alexa Mateman	\$19,726.11	<input type="checkbox"/>
Jul 25, 2024	Susan Hutto	Johnston Wedding	Brandy Carter	\$6,312.60	<input type="checkbox"/>
Aug 16, 2024	Tips & Tricks Webinar	Tips & Tricks - August 2023	Brandy Carter	\$7,005.84	<input type="checkbox"/>
Oct 25, 2024	John Smith	Smith Wedding	Brandy Carter	\$1,506.90	<input type="checkbox"/>
Oct 26, 2024	Pumpkin Spice	Pumpkin Spice Fall Festival	Alexa Mateman	\$1,656.57	<input type="checkbox"/>
Aug 22, 2025	Susan Spring	A Celebration of Spring	Alexa Mateman	\$14,753.49	<input type="checkbox"/>
Aug 23, 2025	Viva Magenta	Pantone Color of the Year 2023	Alexa Mateman	\$5,632.75	<input type="checkbox"/>
Aug 8, 2026	Serena Snapdragon	Serena Snapdragon (Purple & Pink)	Alexa Mateman	\$2,335.84	<input type="checkbox"/>
Not Set	Jane Doe	Unnamed Event	Crystal Evans	\$1,665.27	<input type="checkbox"/>
Not Set	Fleur de Villes Promo Email	Voyage Ball Harbour	Myranda Sauls	\$4,025.70	<input type="checkbox"/>
Not Set	BloomTV Star Florist Contest	Unnamed Event	Myranda Sauls	\$735.07	<input type="checkbox"/>
Not Set	Suey Small	Small Wedding	Brandy Carter	\$39.14	<input type="checkbox"/>





# COMMUNICATING WITH YOUR TEAM

On the Worksheet, florists can specify the precise requirements for each floral arrangement. This clarity streamlines the workflow, ensures everyone is on the same page, and minimizes the risk of miscommunication.

The screenshot displays a software interface for florists. The top navigation bar includes 'Event', 'Details', 'Worksheet', 'Resources', 'Financials', 'Proposal', 'Documents', 'Costs', and 'More'. The user is logged in as 'Serena Snapdragon (August 8, 2026)'. The main interface is split into two panels: 'Design Board' on the left and 'Design Worksheet' on the right.

The 'Design Board' shows a grid of various floral images. The 'Design Worksheet' shows a 'Grand Total \$1,286.00' and an 'Options' button. It features a 'Color Palette' with five color swatches (purple, pink, magenta, tan, green) and a plus sign. Below that is a 'Bouquets' section with a table listing items.

Item Name	Qty	Est Price	Lock	Total	Tax
Bridal Bouquet	1	\$250.00	🔒	\$250.00	TP

The 'Ingredients' section for the 'Bridal Bouquet' includes a photo of the bouquet and a table of components:

Qty	Item Name	Cost	Price	Tax
5	Eucalyptus Blue	\$1.29	\$25.80	ⓘ ×
10	Garden-Like Rose: RP Aspen	\$1.35	\$54.00	ⓘ ×
5	Italian Ruscus Painted	\$2.00	\$40.00	ⓘ ×
5	Lisianthus ABC, Rose Rim	\$1.50	\$30.00	ⓘ ×
2	Pink Flash Spray Roses	\$1.20	\$9.60	ⓘ ×
3	Sheafs Of Wheat	\$0.30	\$3.60	ⓘ ×
4	Snapdragon Pink	\$1.19	\$19.04	ⓘ ×
5	Tinted Pink Pampas	\$3.00	\$60.00	ⓘ ×

Summary: Total Cost: \$60.51, Markup %: 300, Total Price: \$242.04. An 'Add Ingredient' button is visible below the table. A 'Description' field at the bottom lists the ingredients: Eucalyptus Blue, Garden-Like Rose: RP Aspen, Italian Ruscus Painted, Lisianthus ABC, Rose Rim, Pink Flash Spray Roses, Sheafs Of Wheat, Snapdragon Pink, Tinted Pink.





## Bouquets

1.0

### Bridal Bouquet



Serena's Bridal Bouquet

- 5 Eucalyptus Blue
- 10 Garden-Like Rose: RP Aspen
- 5 Italian Ruscus Painted
- 5 Lisianthus ABC, Rose Rim
- 2 Pink Flash Spray Roses
- 3 Sheafs Of Wheat
- 4 Snapdragon Pink
- 5 Tinted Pink Pampas

Description: Eucalyptus Blue, Garden-Like Rose: RP Aspen, Italian Ruscus Painted, Lisianthus ABC, Rose Rim, Pink Flash Spray Roses, Sheafs OfWheat, Snapdragon Pink, Tinted Pink Pampas

Notes: For Lead Designer: Kristin

### Toss Bouquet

1.0



New Recipe

- 3 Carnation Joshua Select
- 5 Israeli Ruscus
- 3 Larkspur Pink
- 5 Lisianthus ABC, Rose Rim
- 3 Pink Flash Spray Roses
- 5 Stock Iron, Rose Pink

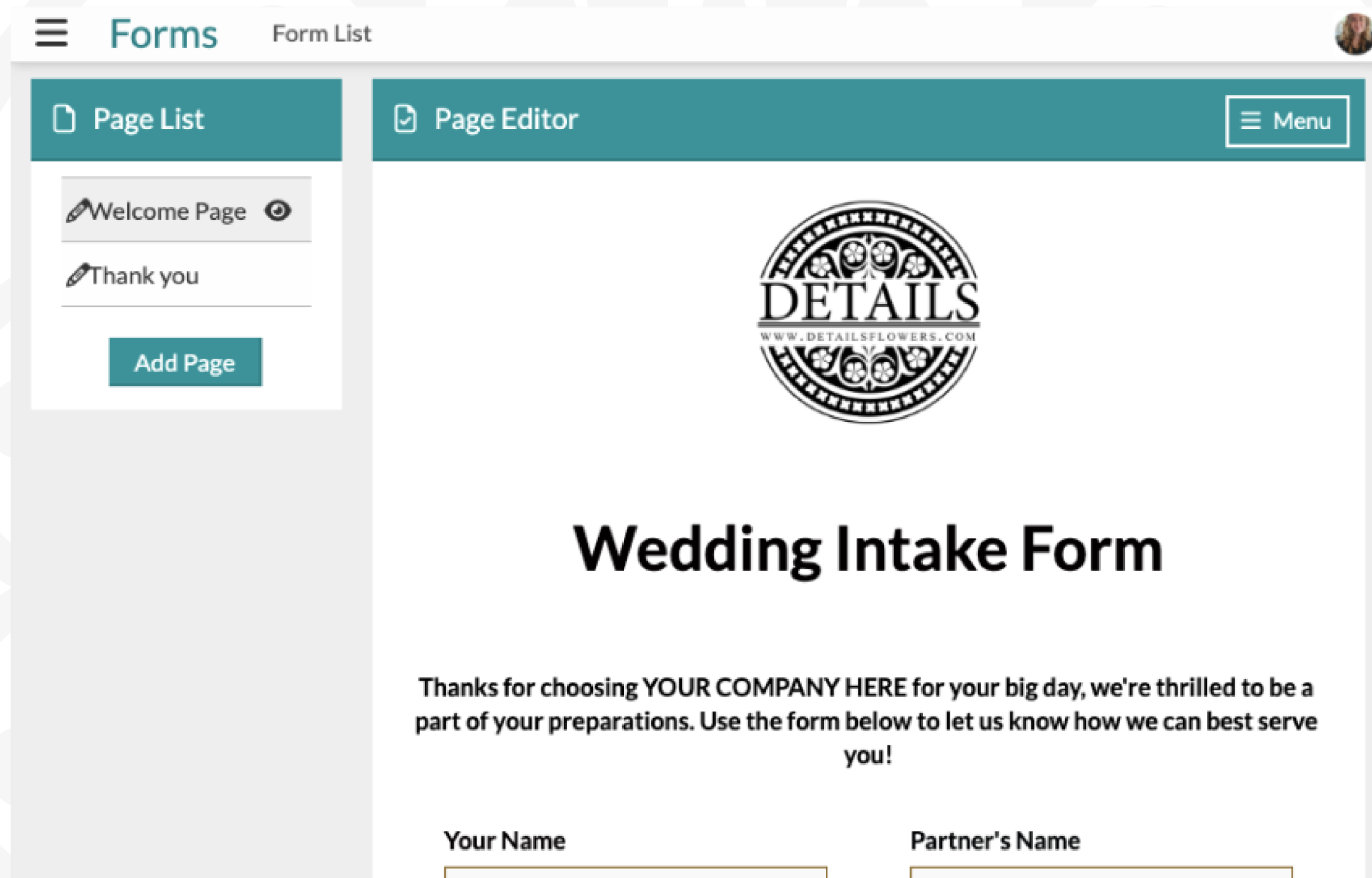
# COMMUNICATING WITH YOUR TEAM

Details also provides a downloadable & printable Recipe PDF for seamless sharing with your design team!



# COMMUNICATING WITH CUSTOMERS

Integrate intake forms and a chat option on your website to give customers accessible means of getting in touch.



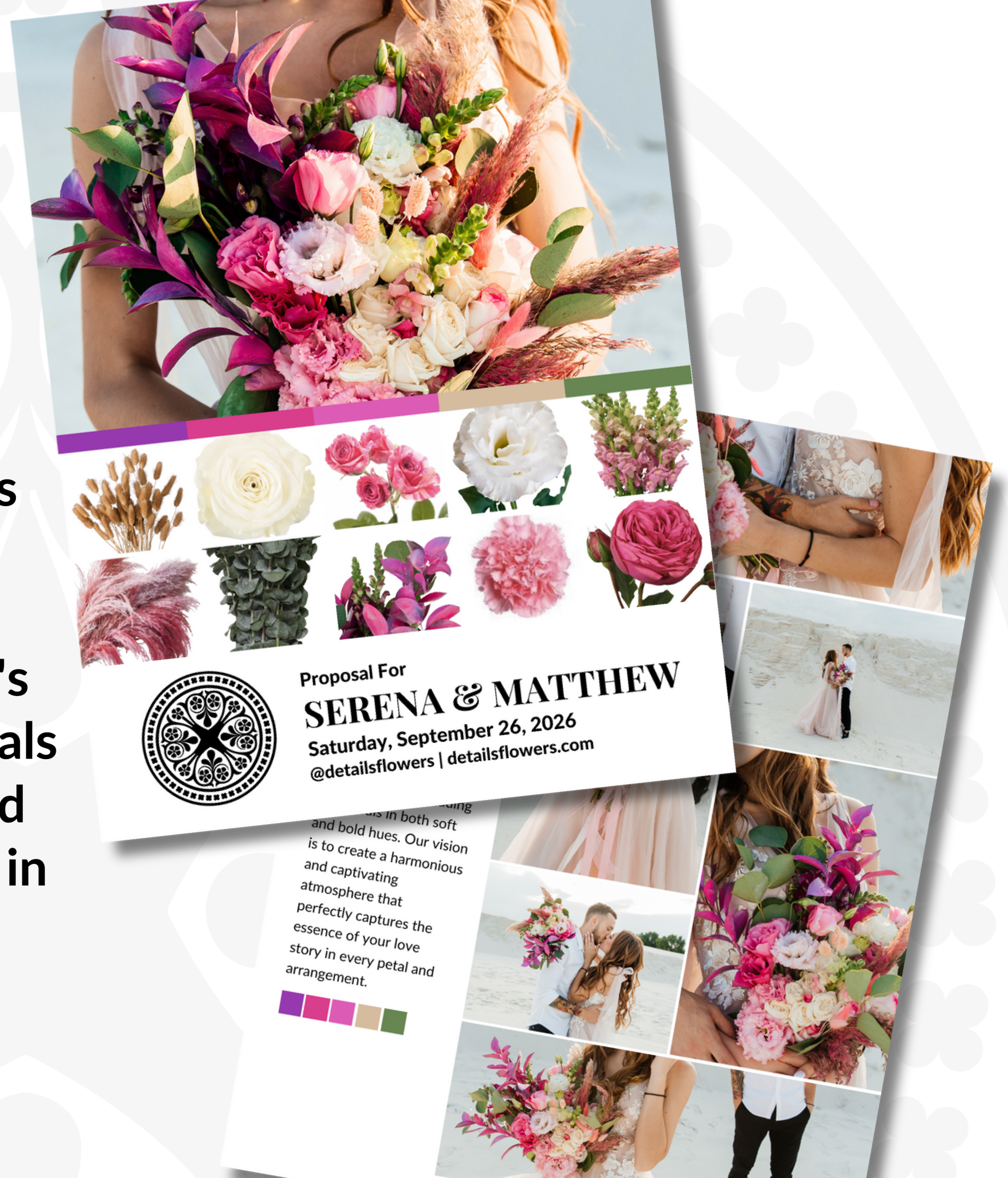
The screenshot shows a web form editor interface. At the top, there's a navigation bar with a hamburger menu icon, the word "Forms", and "Form List". Below this, there are two main sections: "Page List" on the left and "Page Editor" on the right. The "Page List" section contains a list of pages: "Welcome Page" (with a pencil icon and a lock icon) and "Thank you" (with a pencil icon). Below the list is a teal "Add Page" button. The "Page Editor" section shows a preview of a "Wedding Intake Form". At the top of the form is the "DETAILS" logo, which is a circular seal with the text "DETAILS" and "WWW.DETAILSFLOWERS.COM". Below the logo is the title "Wedding Intake Form". The form content includes a thank-you message: "Thanks for choosing YOUR COMPANY HERE for your big day, we're thrilled to be a part of your preparations. Use the form below to let us know how we can best serve you!". Below the message are two input fields: "Your Name" and "Partner's Name".





# COMMUNICATING WITH CUSTOMERS

Visually appealing proposals with images and well-designed layouts help clients envision the floral arrangements, enhancing their confidence in the florist's capabilities. The use of high-quality visuals also demonstrates attention to detail and professionalism, setting the florist apart in a competitive industry.





**RingCentral**



**mailchimp**

**HubSpot**



**Gmail**



**ChatGPT**



# COMMUNICATING WITH CUSTOMERS

Utilizing email communication is an excellent means for your business to engage with and reach out to your customers effectively.

Many email clients offer the capability to create and automate templates for your frequently used emails, streamlining your communication process.

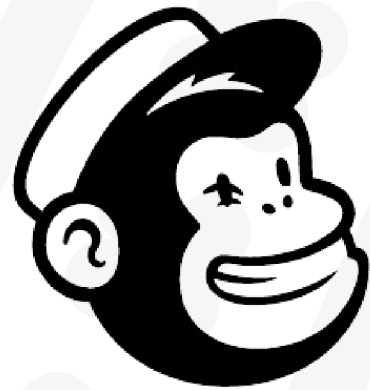






# COMMUNICATING WITH SUPPLIERS

Building and nurturing relationships with suppliers is key to accessing unique blooms and ensuring reliability. Florists can benefit from digital tools like order management systems to keep order data organized. Clear and detailed order transmission is crucial for accuracy, and maintaining an open line of communication with suppliers helps resolve any issues promptly.



**mailchimp**

**HubSpot**

**Gmail**





# COMMUNICATING WITH SUPPLIERS

Within Details, we have streamlined the process for florists to connect with our featured suppliers through the RFQ page, making it exceptionally convenient.

The screenshot displays a web application interface for event management. At the top, there is a navigation bar with tabs: Event, Details, Worksheet, Resources, Financials, Proposal, and More. The user's name and the event date, Serena Snapdragon (August 8, 2026), are shown on the right.

The main content area is divided into three sections:

- Cost Info:** A summary of costs including Event Grand Total (\$863.86), Your Projected Expenses (\$108.56), Actual Costs (\$0.00), Under/Over Projection (\$108.56), and a Need by Date field with a 'Pick Date' button.
- Wholesale Quotes:** A section with a 'View Quotes' button and a grid of supplier logos: taalduinen, B, ALASKA PEONY COOPERATIVE, HAUS OF STEMS, and FRESH. A 'Set Wholesalers' button is located at the bottom right of this section.
- Blooms & Greenery:** A table listing items with columns for Item, Qty Needed, Est. Stem Cost, Est. Total, Qty Ordered, Stem Cost, Total Cost, and Supplier. The table includes items like Carnation Joshua Select, Eucalyptus Blue, Garden-Like Rose: RP Aspen, Garden Rose Hot Pink Piano, Israeli Ruscus, and Italian Ruscus Painted.

Buttons for 'Download CSV' and 'Print Table' are located at the top right of the Blooms & Greenery section.

Item	Qty Needed	Est. Stem Cost	Est. Total	Qty Ordered	Stem Cost	Total Cost	Supplier
Carnation Joshua Select	3.0	\$0.50	\$1.50	3	0.5	\$0.00	+
Eucalyptus Blue	8.0	\$1.29	\$10.32	8	1.29	\$0.00	+
Garden-Like Rose: RP Aspen	10.0	\$1.35	\$13.50	10	1.35	\$0.00	+
Garden Rose Hot Pink Piano	1.0	\$2.99	\$2.99	1	2.99	\$0.00	+
Israeli Ruscus	8.0	\$1.00	\$8.00	8	1.0	\$0.00	+
Italian Ruscus Painted	5.0	\$2.00	\$10.00	5	2.0	\$0.00	+



# WAYS TO SAY THANK YOU TO YOUR TEAM

Celebrating Holidays, Birthdays, & Special Occasions

Spa Days

Weekly Yoga Classes

Traveling to Industry Events

Celebrating Achievements Together





# WAYS TO SAY THANK YOU TO YOUR CUSTOMERS

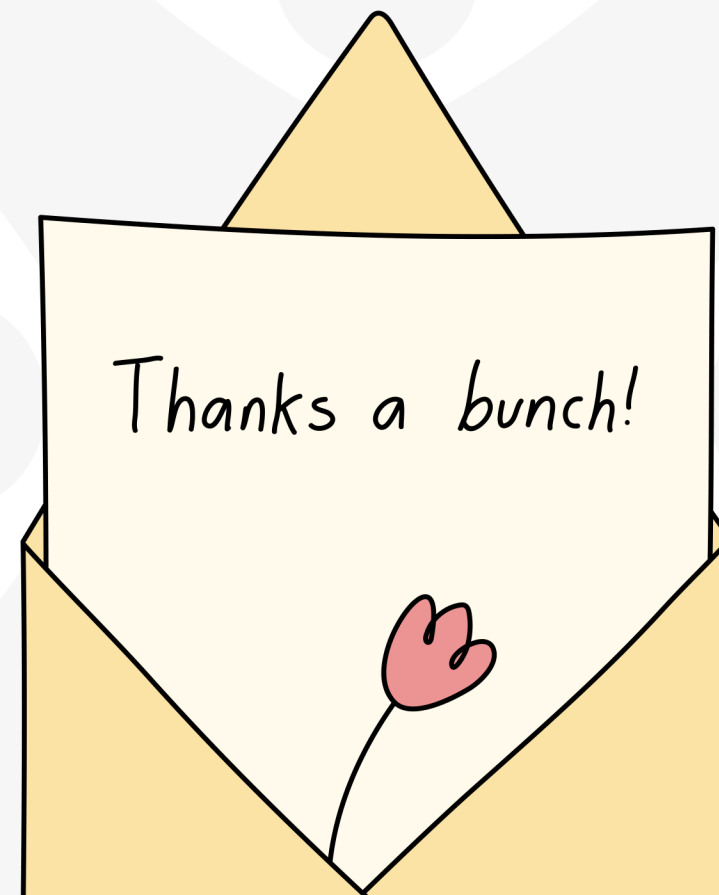
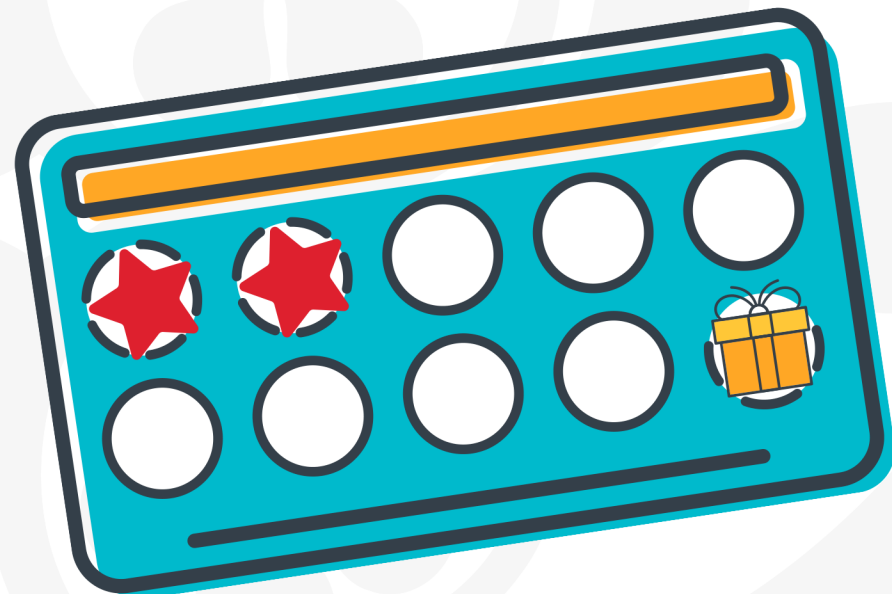
Handwritten Thank-You Notes

Loyalty Programs

Small Gifts

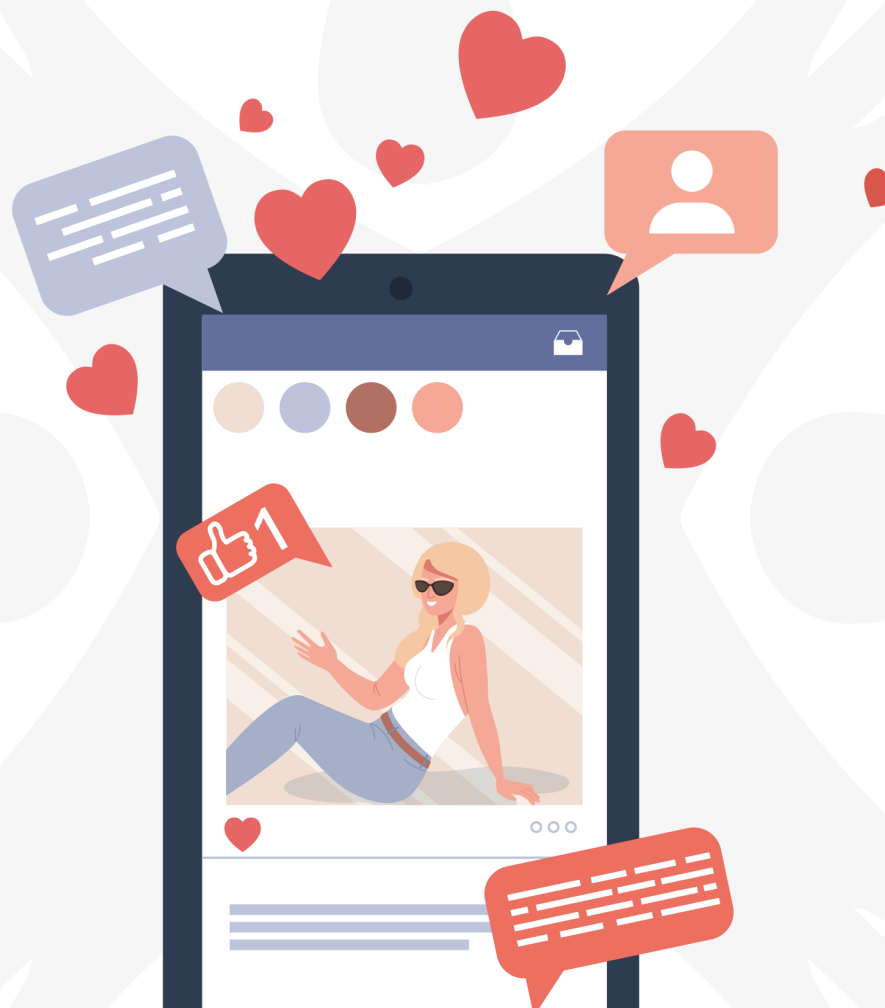
Customer Appreciation Events

Discounts on Future Orders



# WAYS TO SAY THANK YOU TO YOUR SUPPLIERS

Timely Payments  
Collaborative Feedback  
Public Acknowledgment / Referrals  
Occasional Gifts







# THANK YOU!

