

**2023**

# RECERTIFICATION *ABSTRACT BOOKLET*



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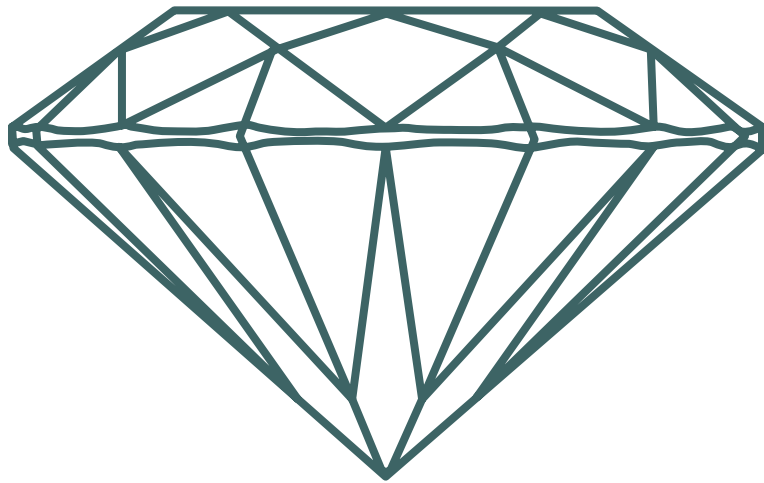
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## 40 YEARS OF GEM PRICING AND BEYOND

RICHARD DRUCKER, GEMWORLD INTERNATIONAL

The value of diamonds and colored gems is impacted, sometimes favorably and sometimes adversely, by the advancements of treatments, nomenclature, and origin in which labs play a significant role.

An example of a problematic treatment is beryllium. A recent inquiry with orange sapphires in a pendant resulted in a price range of a few hundred dollars per carat if it's beryllium treated to \$3,000 per carat if it's natural. Color alone is not indicative of treatment, and sophisticated equipment is needed to identify this treatment. With any significant orange sapphire that comes in for appraisal, we inform the client that a laboratory report is necessary for proper evaluation. As a buyer, know your suppliers and get guarantees of the treatment method, absent of any lab report.

Concerning nomenclature, with tourmaline, the industry and (most) labs are calling any tourmaline with trace amounts of copper, Paraíba. This is problematic because the true Paraíba from its source in Brazil has more copper, has a much more neon glow to its color, and is rare at any size, rarely seen over five carats. Other sources, such as Mozambique, may have trace amounts of copper but not nearly as neon in color and are often found in very large sizes, even over 50 carats.

A similar nomenclature issue is with cobalt blue spinel. Labs have established different standards for the trace amounts of cobalt and at what level they will add the cobalt label vs. simply blue spinel. There is a big difference in the glow of the color because of cobalt and a big price difference. Be cautious of overpricing if cobalt is in the description when the color does not warrant the name.

While the term "pigeon's blood" has historical significance, different labs have different standards. Some apply this only to rubies from Burma, with the finest color and no heat treatment, but other labs may use the term for any ruby, heated or not, from any source. It is difficult to offer guidelines in pricing as we have seen reports for so-called "pigeon's blood" rubies ranging from just a few hundred dollars per carat up to \$50,000 per carat or more. Do not price based on the name; the quality must be there, and heat or no heat is critical to price.

Padparadscha is another gem where the original historical meaning of unheated Sri Lankan gems, in a narrow color range, is now diluted. In 2018, the Laboratory Manual Harmonization Committee widened the color description, locations including Vietnam, Madagascar, and Tanzania, and included heated stones. This has increased the price of low-end stones that would not have been in this category.

The name alexandrite was taught to indicate the color change effect of red to green or purplish red to bluish green. But today, any color change chrysoberyl is called "alexandrite." Some strange "ugly" color changes are getting reports that state the gemstone as alexandrite. Gems should be priced based on quality, not the name.

Origin is over-relied on within the industry, considering that origin reports are often an opinion based on scientific evidence. Historically, the origin was first used to convey a quality appearance. At that time, you could count the major ruby and sapphire sources on one hand. Today, there are many sources and geological traits that can overlap. Prices may be based on origin reporting that might not even be correct. Auction houses often request more than one report from reputable labs before selling. Known stones have been pulled from auction due to multiple origin reports. It may be a difficult call when appraising, buying, or selling. We value what we are presented with, and if the lab is respected, we will likely go with that call for origin but certainly can recommend further investigation if there are suspicions. Again, look at the quality and not just the paper.

There is a growing trend to develop and market a gem or a specific location. Common themes are responsible sourcing, sustainability, and traceability. Much debate is brewing on this, as many claims are questioned for accuracy.



Lab-grown diamonds continue to increase in popularity and production and decrease in price. In most grades, they are 85–90% below the price of natural. Here too, claims of “ethical,” “green,” or “responsible” are being thrown around to compete with natural diamonds, but not all claims are validated. Honest selling practices are needed to avoid situations like the insurance agent that noted upset customers finding out that the replacement cost of their lab-grown diamond was a lot less than what they paid. Prices will continue to slide until the bottom is reached. Identification is a challenge, and the instruments on the market that are “affordable” are screeners that typically have some degree of false positives or negatives. Know the limitations of the instrument that you buy. The AGS refers to the [ASSURE Program](#), which evaluates many of the instruments on the market for important key metrics.

### **Key Takeaways**

- The value of diamonds and colored gems is impacted, sometimes favorably and sometimes adversely, by the advancements of treatments, nomenclature, and origin in which labs play a significant role.
- Origin is over-relied on within the industry, considering that origin reports are often an opinion based on scientific evidence.
- Lab-grown diamonds continue to increase in popularity and production, and decrease in price.



## APPRAISAL BASICS AND YOUR RESPONSIBILITIES AS AN AGS MEMBER

JOEL HASSLER, CGA INSTRUCTOR, VON HASLE JEWELERS

The “Minimum Appraisal and Report Guidelines,” outlined in the American Gem Society (AGS) Membership Manual, are mandatory for all AGS members, not just Certified Gemologist® Appraisers. These guidelines aim to ensure a high standard of professionalism. At Conclave this year, we highlighted a few areas where mistakes are commonly found.

To begin, what is an appraisal? AGS Membership Manual provides this definition:

*An appraisal is a written report that clearly defines an item which may be tangible or intangible personal property, while analyzing and stating material facts for the purpose and intended use, defined as the “function” sought by the client, and is prepared by a disinterested person who is qualified by having completed appraisal education and testing, and having specialized knowledge and training that relates to the item being appraised. (American Gem Society, AGS Membership Manual, American Gem Society Minimum Appraisal and Report Guidelines, Appraisal Definition)*

You will notice that one of the requirements is “a person who is qualified by having completed appraisal education.” Experience on the job is not considered qualified education. To write an AGS appraisal, additional education is required.

What about a report on an item that was sold? The Manual states:

*Avoid authoring or giving a report titled “appraisal,” “certificate,” “certificate of assurance,” assurance of value,” or any other similarly titled report that states a value conclusion or monetary value that is different from the selling price of the item without a full disclosure explaining the difference. If the author or preparer of the report is also the seller or an agent of the seller, that relationship MUST be disclosed in the report along with the date of sale. Unless market research or the cost approach (as outlined in “Appraisal and Report Values, Part B”) has been done to determine the value, the report cannot be titled “appraisal.” If a pre-made form is used that is titled “appraisal,” it must also include a statement clearly indicating that the report was not performed to acceptable appraisal standards. Such a report should be entitled “Statement of Replacement Cost,” “Estimate to Replace,” “Cost of Replacement,” or similar wording. (American Gem Society, AGS Membership Manual, AGS Standards for Appraisals, Reports, and Gemological Services, Professional Practices, i.)*

Disclaimers and waivers are still prevalent and commonly seen on appraisal reports. You should avoid using language that attempts to waive all your liability. This can be seen as unprofessional and, in most jurisdictions, does not actually protect you. It is recommended that you discuss disclaimers and waivers with your attorney and have Errors & Omissions insurance or Appraiser Liability Coverage.

Descriptions of items are often lacking. As an appraiser, it is your responsibility to determine what is considered “significant” and list it in your report. A 10mm diamond will have more significant attributes than a 10mm amethyst. You’ll need to list additional details beyond the 4Cs when describing that diamond, as the cut of the diamond will greatly affect your conclusion on value. The fluorescence, girdle thickness, table size, polish, and symmetry would all be worth noting. Simply saying the diamond cut is “very good” is not suitable.

Trademark descriptions are another thing that is often missing from reports. The Manual states:

*Describe trademarks, hallmarks (full or partial), OR export marks, in the report, whether they are stamped or by hand. (American Gem Society, AGS Membership Manual, AGS Standards for Appraisals, Reports, and Gemological Services, Professional Practices, q.)*



## APPRAISING



Often jewelers will avoid putting this information on reports to keep their designers private and ensure they are allowed to replace the items should there be a claim. Best practices are to include this information to allow for a more accurate replacement of the item.

Split grading of diamonds should only be used when there is a group of diamonds. A single diamond should be given a single grade for color and clarity. The Manual states:

*Split cut, color or clarity grading cannot be used in a report on a single stone. If there are limiting conditions that prevent accurate determination of the cut, color or clarity grade, a narrative statement shall be used in describing these conditions. A single cut, color or clarity grade conclusion shall be assigned along with a description of the limiting condition and a statement that the grade is provisional until it can be graded unmounted.* (American Gem Society, AGS Membership Manual, AGS Standards for Appraisals, Reports, and Gemological Services, Reports, n.)

It's strongly recommended that each member take some time to review the AGS Minimum Appraisal and Report Guidelines within the AGS Membership Manual in their entirety to confirm that their current reports meet the guidelines or if adjustments are necessary. To download and review the AGS Membership Manual [click here](#).

### Key Takeaways

- The AGS Minimum Appraisal and Report Guidelines within the AGS Membership Manual are in place for all AGS members and help us hold ourselves to a higher standard than the rest of the industry. These guidelines should be reviewed, especially by those producing appraisals, for things they might be missing in their reports.
- You should avoid using language that attempts to waive all your liability in a disclaimer or waiver. This can be seen as unprofessional and, in most jurisdictions, does not actually protect you.
- Descriptions of items are often lacking. As an appraiser, it is your responsibility to determine what is considered “significant” and list it in your report. Listing additional information for diamonds and trademark descriptions are important.



## APPRAISAL TAKE-IN PROCESS

Laura Stanley, CGA Instructor

At Conclave this year, an unofficial poll showed that only about half the appraisers do the “take-in” part of the appraisal process. It is often left up to salespeople or the repair counter. A repeatable and consistent take-in process becomes even more crucial to avoid confusion. It is vital to take your time and demonstrate professionalism in your approach.

It’s important to point out that some appraisers choose not to take items in for appraisal but prefer to do them “while the customer waits” and return the items to the customer right away.

More concerning was the low percentage of appraisers and stores who employ some form of “appraisal service agreement” or “contract.” With a contract, an appraiser can adjust the amount of liability they have when the items are in the possession of the appraiser. Each jurisdiction carries with it different requirements. You should work with your attorney to develop the proper conditions and determine the level of protection you are comfortable with. It is almost impossible, and not recommended, to try and remove all liability and is often a mark of an unprofessional appraiser.

Additionally, a service agreement or contract helps define the responsibilities of the appraiser and outline the scope of work. Should the customer use the appraisal for something other than originally intended, it can help protect you and prove that you did the work that was agreed to. This is a standard best practice in other service and professional industries.

Bailment is a common-law legal concept that applies when items are left with the appraiser or any jeweler. A simple definition of bailment from Dictionary.com is “The delivery of personal property returnable to the bailor after being held for some purpose.” The bailor is the person who leaves the property, and the person who receives the property is known as the bailee. It is understood that once the particular purpose has been completed, the bailee will return the item to the bailor. Bailment laws vary from state to state, and you should be aware of your responsibilities and liabilities. It’s suggested that you discuss your take-in process with an attorney and your insurance company to ensure you are covered in the event of a claim.

It is important to review your insurance policy with your agent to determine your coverage level when items are left in your care. What level of detail is required on your take-in forms? Do items need to be secured separately from your other merchandise? What perils are covered? Are you liable for the items that are in your possession? You can rarely protect yourself from gross negligence, so all steps should be taken to take care of your client’s items while they are in your possession.

Your take-in form should indicate what level of testing or identification you are initially doing. Are you electronically testing metal fineness? Do you use a diamond screening device? Sometimes additional testing is needed to identify a stone. Note any identifying characteristics that might be present. You should include the number of stones in the item and the sizes of any significant stones, inscriptions, and other details that help describe the piece. Remember, a vague take-in description might be seen as an attempt to avoid responsibility. In today’s technology-driven society, a good common practice would dictate that photographs should be taken of the item. When scheduling an appointment with your clients or in correspondence with them before the appointment, remind them to bring any previous paperwork they might have (e.g., purchase receipts, grading reports, appraisals). Some appraisers make it a practice to make copies of the items and return the originals to the client immediately. These can then be kept in your client’s work file.

Another important part of the take-in process is the value threshold or agreed value on the items left with the appraiser. What is the declared value? Often, the customer does not know the value of their item, thus the reason for the assignment. Review the following section taken from the Advanced Personal Property Appraisal (APPA) course authored by Bill Hoefler and currently used by AGS as additional education required to be an ICGA:





“Often, an appraisal client who is asked to declare a value on a take-in slip will not know the value of the item being taken. After all, the client brought the item to the appraiser for valuation. Can the appraiser help the bailor with the value? It is obvious that the appraiser has an interest in the outcome of the agreed value on a take-in slip. Nonetheless, an appraiser can assist the bailor with the declared value. If the agreed-upon value is reasonably correct, it will be upheld during dispute. If the agreed-upon price is not reasonably correct, it will not weather a legal attack unless it favors the bailor. Remember, if an appraiser helps a client with a value declaration, he or she must do so with a high degree of accuracy.”

Having an agreed-upon value at the time of take in allows for a statement that can be used in the event of a dispute and can ensure that the insurance coverage is appropriate.

Don't let your customer dictate your take-in process or try and hurry you along or cause you to skip steps. You are a professional, and your reputation is important.

### **Key Takeaways**

- A repeatable and consistent take-in process is crucial for appraisers to avoid confusion and maintain professionalism. Taking your time and demonstrating professionalism in approaching the appraisal process is essential.
- Implementing an appraisal service agreement or contract helps define the appraiser's responsibilities, outlines the scope of work, and provides a level of liability protection. Working with an attorney to develop appropriate conditions and determine the desired level of protection is recommended.
- Appraisers must understand bailment laws, review insurance coverage, and ensure proper documentation and security measures are in place. Taking steps to protect clients' items while in possession, such as detailed descriptions, photographs, and copies of documentation, helps establish accountability and safeguards against potential disputes. It is important not to let customers dictate the take-in process and maintain professionalism throughout.



## CGA REFRESHER

### JOEL HASSLER, CGA INSTRUCTOR

At this year's Conclave, we covered several topics during the CGA Refresher that could use additional focus.

#### Item Descriptions

The Minimum Appraisal and Report Guidelines state that items should be “adequately described, including the analysis and description of relevant components. This permits positive physical identification....” (American Gem Society, AGS Membership Manual, American Gem Society Minimum Appraisal and Report Guidelines, Reports, c.)

We still see many reports that rely too heavily on the photographs and leave out details on the mountings. You should include things like the dimensions and measurements of the gemstone(s) as well as the mountings. The total weight of the piece of jewelry is important. Including manufacturing details and methods is important, too, as they may contribute to the value and finding truly comparable items. Some questions you may ask yourself: Are the shoulders hollow to lighten the ring? Was the piece cast or die-struck? Is it a stronger lobster claw clasp or a lightweight spring ring? These are all important details.

Gemstones are often inadequately described as well. Using simple terms like “well cut” can leave much to the imagination and not appropriately describe the item. The more value the stone has, the more details will be required to describe it and support your value conclusion adequately.

#### Lab-Grown Diamond Disclaimers

This is always a hot topic with lots of opinions. A blanket disclaimer that you are assuming all diamonds to be natural unless stated otherwise is an option that has been discussed and recommended in the past. As time has progressed and diamond verification instruments have become more affordable, commonplace, and even required in the AGS Accredited Gem Labs®, the more professional route is to state what you have done to screen for lab-grown diamonds. What screening device(s) did you use? Did you just use magnification clues? As with any gemological conclusion you make, your reputation and professionalism are on the line, and you should be confident in your call. You can't blame mistakes on the screening device or the grading reports.

#### Abbreviations and Trade-Specific Terms

Again, we turn to the American Gem Society Minimum Appraisal and Report Guidelines. They state:

“When used in a report, terms and abbreviations that have a special meaning within the jewelry industry and grading symbols applied to diamonds or other gems must be defined either directly in the report or by reference to a text containing such definition. The text must be available to the client and others. The client and other concerned parties are entitled to know the meanings of terms, abbreviations, numbers, and symbols used. The diamond grading system, for example, shall be shown graphically with an explanation of each grade. If other than the GIA colored stone grading systems, or the GIA or AGS Diamond Grading Systems are used, the system must be shown parallel to the GIA system.” (American Gem Society, AGS Membership Manual, American Gem Society Minimum Appraisal and Report Guidelines, Reports, d.)

What is a pennyweight? What does SI2 mean? What does “linge” mean when talking about watches? These need to be explained in the report or a glossary, graphically, or as compared to the GIA system. Many appraisal software systems can now include glossaries to help define these and other terms that we take for granted in our daily lingo.



### Color Vision Test

Color vision testing is still a requirement for the CGA title. The requirement is:

“Complete a color vision test, and strongly consider re-taking the screening after age 55, or if the individual experiences any medical changes.” (American Gem Society, AGS Membership Manual, Educational Requirements, Certified Gemologist Appraiser, f.)

While this holds true and is important for anyone grading colored stones, it is something to consider when using diamond verification instruments. Several devices require user input and/or user interpretation to decide based on the colored representation of the phosphorescence and fluorescence of the diamonds on the machine’s display. If there is color-vision impairment, subtle differences in the colors shown on the screens might have you interpret that a diamond is natural when it is actually a lab-grown diamond.

### Key Takeaways

- In appraisal reports, provide detailed descriptions of items, including dimensions, measurements, mountings, and manufacturing details. Thorough item descriptions support accurate value assessments and enable positive identification. Avoid using generic terms like “well cut” for gemstones, especially for high-value stones, and provide specific details to adequately support the value conclusion.
- To ensure clarity and understanding, defining terms, abbreviations, and grading symbols used in appraisal reports is crucial. The text must be available to the client and others. The client and other concerned parties are entitled to know the meanings of terms, abbreviations, numbers, and symbols used.
- State what you have done to screen for lab-grown diamonds. What screening device(s) did you use? Did you just use magnification clues? As with any gemological conclusion you make, your reputation and professionalism are on the line, and you should be confident in your call.



# TIPS TO PREVENT GRAB-AND-RUN AND SMASH-AND-GRAB JEWELRY THEFTS

## JEWELERS MUTUAL® GROUP

A grab-and-run theft is when a criminal(s) walks into a jewelry store, appearing to browse the merchandise. They typically move toward the most valuable merchandise on the showroom floor and ask to see a particular piece. From there, they run off with whatever they asked to view.

The number of small-scale thefts reported to the Jewelers' Security Alliance (JSA) every year remains staggering. Each incident may represent a small dollar amount when compared to other types of crimes, but they add up fast.

### How do you prevent grab-and-run theft?

Ask to see a customer's ID before allowing the individual to try on merchandise, regardless of its value. Once you've verified that the ID is legitimate, keep it until the customer has returned the piece. Remember to show an item only after you've examined the ID. Multitasking can be risky because some grab-and-run attempts can have suspects taking merchandise directly from the hands of sales associates before the ID is deemed legitimate.

Never show more than one piece at a time. If a customer is adamant about comparing pieces side by side, put one on yourself and let the customer compare. Never have more than two pieces out of your showcases at once, as some criminals are bold enough to attempt grab-and-run thefts with entire trays of rings.

Many criminals will appear nervous or fidgety before attempting a grab-and-run. Document suspicious incidents like these so that the rest of your staff will know how to react properly if the suspect returns.

If you don't know what type of criminal behavior to look for, these crimes will continue to affect the industry a few pieces at a time.

Another related crime is the smash-and-grab, a more violent and destructive variation to the grab-and-run detailed above. In this scenario, several people enter your jewelry store, obscuring their appearance with their clothing. They may pull out hammers or other tools and begin smashing the glass jewelry cases, grabbing all the items they can. They are in and out in less than a minute.

Smash-and-grab robberies occur during business hours when shoppers are in stores. Robbers rely on speed to commit crimes. An easy escape and valuables close to the door are what they look for.

### What should you do?

Do not intervene. The safety of you, your staff, and your customers are the top priority. The goal is to have the threat leave your store as quickly as possible. Most smash-and-grab crimes are over in a matter of minutes.

### Tips to stay safe and limit loss:

- Stay vigilant and be aware of individuals who may be casing the store.
- Place high-end merchandise away from showcases closest to the entrance.
- Spread high-end items throughout different showcases.
- Apply security film to windows, doors, show windows, and showcases.
- Consider hiring a security guard during busy selling seasons or business hours.
- Maintain a log of all suspicious incidents for future reference and identification.

Looking for more ways to mitigate loss and keep your business secure? Read Jewelers Mutual Group's comprehensive Jeweler's Security Guide at [jewelersmutual.com/jeweler-security-guide](https://www.jewelersmutual.com/jeweler-security-guide).



## Key Takeaways

### Implement the following measures to reduce the risk of grab-and-run thefts:

- Ask for a customer's ID before allowing them to try on merchandise, regardless of its value. Verify the legitimacy of the ID and hold onto it until the customer returns the item. Show items only after examining the ID, avoiding multitasking.
- Display only one piece at a time and, if necessary, put on one item yourself for comparison.
- Document suspicious incidents to help staff identify potential repeat offenders.



# UNLOCKING THE POTENTIAL OF AI AND CHATGPT IN YOUR BUSINESS

## SUMMARY BY THE AGS TEAM

At this year's Conclave, business consultant Ford Saeks presented a session titled "Unlocking the Potential of AI and ChatGPT in Your Business." During the session, Saeks highlighted the benefits of using ChatGPT and other artificial intelligence (AI) tools in the jewelry industry.

Saeks emphasized that ChatGPT, an AI chatbot developed by OpenAI, can potentially revolutionize the way jewelers operate. He described ChatGPT as "100 times smarter than the smartest person" and provided his opinion that AI would replace humans. Instead, he emphasized that AI would replace humans who fail to embrace and utilize it effectively.

One of the key advantages of using ChatGPT and similar AI programs is the ability to automate tasks, improve efficiency, and help make better decisions. Jewelers can leverage AI for various applications, including brainstorming business and marketing ideas, creating content, engaging on social media, providing product descriptions, writing emails, translating languages, analyzing data, researching markets, generating leads, drafting business plans, providing legal forms, preparing Excel spreadsheets, and even basic computer programming.

Saeks recommended that jewelers educate their employees on how to utilize AI tools effectively. By empowering employees with this technology, they can enhance their overall productivity. For example, ChatGPT can streamline time-consuming tasks, enabling jewelers to focus on their core responsibilities and deliver a higher level of service to their clients.

One of the key aspects to maximizing the benefits of ChatGPT and other AI tools is "effective prompting." The chatbot performs best when it receives specific instructions and context. Saeks advised jewelers to type instructions as if conversing with a real person, being clear, specific, and providing all relevant details.

In writing prompts, Saeks suggested, "Type like you're talking to a real person, such as an intern. Be specific and provide context and dialogue. When you train it, it gets smarter, just like an employee."

One prompt Saeks suggested was, "Act like an experienced copywriter with high levels of expertise and authority within the jewelry industry." You can then tailor each prompt for the medium, whether writing content for social media or an article for your blog.

Additionally, Saeks suggested asking ChatGPT to assume specific identities or professions. For instance, instead of writing an angry email in response to customer complaints, Saeks recommended seeking the assistance of ChatGPT in crafting a response as a customer service expert.

While ChatGPT offers tremendous value, it is important to maintain a balance between automation and personalized touch. Jewelers should add their unique individuality to the content generated by AI, ensuring that their brand voice and style are reflected. This prevents every jeweler's blog or social media content from becoming generic and identical. Jewelers can customize and refine the outputs generated by ChatGPT to align with their specific branding and communication needs.

As with any emerging technology, ChatGPT has sparked excitement and concern within the industry. Adopting AI tools like ChatGPT is not meant to replace humans but rather to augment their capabilities. It serves as a valuable tool that enhances productivity, creativity, and efficiency. Human oversight, input, and quality control remain essential to ensure accuracy and reliability. If the AI gives you an answer you are unsure of, fact-check it via Google search or other methods.

By embracing AI technology and effectively utilizing tools like ChatGPT, jewelers can automate tasks, improve efficiency, and make better-informed decisions. Proper training, effective prompting, and customization are key to maximizing the benefits of AI while preserving the personal touch that sets jewelers apart. With this valuable resource, jewelers can elevate their professionalism, save time, and enhance their overall business operations.



## Key Takeaways

- ChatGPT and similar artificial intelligence programs, can help jewelers automate tasks, improve efficiency, and make better decisions.
- ChatGPT can generate content for various purposes such as product descriptions, social media captions, emails, and more, saving time and effort for jewelers.
- Effective prompting and refining instructions are essential for obtaining the desired responses from ChatGPT.



Thank you to GIA for graciously providing the following for inclusion in the American Gem Society's annual recertification exam

## THE CURRENT LABORATORY-GROWN DIAMOND MARKET

LISA KENNEDY, GEMOLOGICAL INSTITUTE OF AMERICA

The laboratory-grown diamond market has evolved rapidly since the creation of the first lab-grown diamond in the 1950s. The global lab-grown diamond market was valued at US\$22.45 billion in 2022 and is forecasted to grow to US\$37.32 billion by 2028.<sup>1</sup>

Laboratory-grown diamonds are structurally identical to natural diamonds; they are tetrahedrally bonded carbon atoms. High-Pressure, High-Temperature (HPHT) and Chemical Vapor Deposition (CVD) are the current production methods used. There are many limiting factors in terms of the size and qualities grown by both methods. Equipment capacity, growth time, and costs are some factors that producers must consider. The largest synthetic uncut diamond reported by Guinness World Records is a 150.42-cts. HPHT-grown diamond measuring 28.55 x 28.25 x 22.53 mm (about the size of a U.S. quarter) by Meylor Global LLP (U.K.) and Dr. Andrey Katrusha (Ukraine). HPHT-grown yellow diamonds grow the quickest of all the colors, taking around five to six days. HPHT-grown blue diamonds grow much slower than yellows, usually taking seven to 10 days. Colorless diamonds are the slowest and most difficult of all colors to grow.

The supply chain of laboratory-grown diamonds consists of roughly five segments—manufacturing, cutting and polishing, polished diamond trading, jewelry manufacturing, and jewelry retail. Some producers grow, cut, and polish the materials, then sell the polished lab-grown diamonds wholesale to jewelry manufacturers or retail right to the consumer. Other companies are vertically integrated, meaning a single company covers all steps in the supply chain. Many companies have created subsidiaries that sell finished jewelry pieces under different names.

The global lab-grown diamond market volume was at 9.13 million carats in 2022.<sup>1</sup> China was reported as the main producer by volume accounting for over 50% of global supply, followed by India. China is the primary producer of HPHT lab-grown diamond melee. Most producers in India use CVD technologies to create their lab-grown diamonds. Similarly, the majority of lab-grown diamonds produced in the U.S. (about one million carats estimated in 2021) are also produced with CVD technologies. Many facilities are staffed 24 hours a day, seven days a week.

Consumer awareness of lab-grown diamonds is increasing. In a consumer study deployed in fall 2022, completed by 1,273 consumers, 76% noted that they knew of laboratory-grown diamonds.<sup>2</sup> Consumers' awareness was credited to promotion by jewelry stores/websites and social media. Consumers are heavily motivated to buy lab-grown diamonds based on the size/price opportunity. In the same consumer study, participants were presented with identical rings—one set with a natural diamond priced at \$7,000 and another with a lab-grown diamond priced at \$4,900. Of the participants, 61% chose the lab-grown diamond ring. However, as prices reduce for lab-grown diamonds, so do the profit margins. In 2022, the reported wholesale price of a lab-grown diamond was 14% of that of an equivalent quality natural diamond, and the retail price was 30% of an equivalent quality natural diamond. Compared to 2019, when the reported wholesale price was 20% of that of an equivalent quality natural diamond, and the retail price was 50% of an equivalent quality natural diamond.<sup>3</sup>

Consumers are ready to embrace fashion jewelry set with laboratory-grown diamonds, and an increase in interest in bridal jewelry (including center stone) has also been reported. Consumers want assurance and rely on our trade to accurately represent these materials. As reported by the 2022 consumer study mentioned above, 74% of Americans and 58% of Canadians would pay for natural and lab-grown diamond certification, even if it didn't come with the jewelry.

At GIA, we are seeing an increase of colorless (D-F) laboratory-grown diamonds being submitted, both HPHT and CVD, compared to years past when most of the submitted lab-grown diamonds were colored. The majority of both HPHT and CVD lab-grown diamonds submitted are above two cts. We've seen the CVD population making steady gains between the two methods. Around 2016, it took





over as the majority of submissions. Nowadays, we see as many CVD-grown diamonds in a single day as we used to see within an entire year.

### Key Takeaways

- Production quantities, qualities, and consumers' awareness of laboratory-grown diamonds are steadily increasing.
- Equipment capacity, growth time, and costs are key limiting factors in the size, qualities, and quantities of laboratory-grown diamonds being produced.
- China and India are the current largest producers of laboratory-grown diamonds by volume.
- Consumers are ready to embrace fashion jewelry set with laboratory-grown diamonds, with consideration to use as bridal jewelry on the rise.
- Most laboratory-grown diamonds submitted to GIA (HPHT and CVD) have been colorless (D-F) and above two cts. in size.

<sup>1</sup>Global Lab Grown Diamond Market: Analysis By Manufacturing Method, By Size, By Type, By Nature, By Application, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028. (n.d.).

<sup>2</sup>Global Voices, *The MVEye 2022 International Lab-Grown Diamond Consumer and Trade Market Research Report*. (2022).

<sup>3</sup>Linde et al. (2022), *The Global Diamond Industry 2021–22*, Bain & Company, [https://www.bain.com/globalassets/noindex/2022/bain\\_report\\_diamond\\_report-2021-22.pdf](https://www.bain.com/globalassets/noindex/2022/bain_report_diamond_report-2021-22.pdf)



# CHOOSING THE RIGHT SUCCESSOR FOR YOUR BUSINESS

## OBSIDIAN BUSINESS PLANNING SOLUTIONS

One of the many questions owners ask themselves when considering exiting their companies is: Who is the right successor? Is it a key employee or partner, an adult child active in the business, or an unrelated third party such as a private equity group or company in the same industry?

Every owner has unique goals for their business exit, and the right successor for you is the party that can best meet your goals.

Let's talk about a process you can use to set your goals to identify your company's best successor.

### **Step 1: Establish your “foundational” goal or “financial security number.”**

Your financial security number may be a dollar amount you need to live the post-exit life you desire, or it might be the dollar amount you feel you've earned for a lifetime of investing in your company, or it might be an arbitrary goal you set when you started your company. This goal is foundational because you won't consider your business exit successful unless it is met.

### **Step 2: Assemble current data.**

To estimate your financial security number accurately, begin by listing the value of your assets, liabilities, and current expenses. Your asset list should include the value of your business, financial assets (i.e., savings accounts, CDs, 401(k) plans), and the value of the real estate you own (except your residence assuming you'll continue to live in your home after your business exit). Your liabilities might include mortgages or other outstanding loans, such as credit card balances. Major expenses may include insurance, transportation, utilities, clothing, vacations, tuition, and property taxes.

### **Step 3: Imagine your life after business ownership.**

Before estimating whether your financial resources will support you in your post-business life, we must know how you want to live. Will you travel more, live more simply, buy a second home, be available on a consulting basis to the new owner of your company, start a new business, or buy a yacht and sail six months of the year?

Once you know where you stand financially today and how much it will cost to live the post-exit life you desire, you can project whether your financial resources will be able to support the life you want to live.

### **Step 4: Discuss your timing, successor, and sale proceeds preferences.**

Many owners have an idea of their exit date, whether it's when they reach a certain age, their company reaches a certain value, a child gains a certain amount of experience in the company, or a certain number of years in the future. Your preferred exit date is likely not set in stone, and many owners adjust them based on what we learn in the first three steps of this process.

In this step, you must decide what type of successor you prefer. Do you prefer that one of your children or a group of key employees succeed you in ownership? Do they have the means to purchase the business? Some strategies transfer businesses to these parties at prices owners want, so it's important to know who you want to succeed you.

Finally, set a proceeds goal: What amount—net of taxes, advisor fees, etc.— do you want to take away from closing?

### **Step 5: Don't forget your other goals for your business exit.**

Beyond goals related to financial security, desired successors, timing, and proceeds, most owners have goals related to their values. These might include rewarding the employees who helped you build your company, continuing a family legacy, or keeping the company in your community. Identify and reach your “values-based” goals because attaining them can be as important as reaching your financial security number.

Mapping out a succession strategy is critical to ensuring ongoing business operations. Embarking on this journey helps prepare the business, the team, and yourself for the future.



## Key Takeaways

- The party who can best meet your financial and values-based goals is the best successor for you and your business.
- Imagining the life you will live after business ownership is a key component of estimating the financial resources you will need from the sale of your company. .
- Don't rule out family members or key employees as successors because you assume they cannot pay your sale price.



# UNDERSTANDING YOUR INCOME STATEMENT

ABE SHERMAN, BUYERS INTELLIGENCE GROUP

The Income Statement, also called the P&L, should be straightforward to understand. The accounting world, however, doesn't always make it easy for us since there are different accounting methods for different industries. Also, we see variations in what should be consistent throughout the jewelry industry.

There are only *five numbers* for you to understand: **Sales, Cost of Goods Sold, Gross Profit, Expenses, and Net Operating Income**. That's it. Unfortunately, we see all manners of numbers added to this, producing pages of details that don't offer much clarity.

Sales are the total of all the revenue during that period. However, we separate scrap purchases and sales from the company's sales. Items purchased to be scrapped should be "below the line" and considered a separate part of your business.

Exactly what is the **Cost of Goods Sold** (aka COGS)? In retail jewelry companies, the only thing you should see under COGS is the *Cost of Goods you've sold*. That may be an obvious (and weird) statement, but we see things like freight built into COGS, for example, but we disagree that freight should be added to the cost of the jewelry. Considering the term is Cost of Goods Sold, not Cost of Goods and Freight Sold, you only need to know the cost of every item. Don't overcomplicate it.

For example, when you sell an item for \$1,000, and the cost of that item is \$450, you only need to count that \$450 to know your COGS *for that item*. I'm assuming you have a Point of Sale (POS) system where you enter your *actual cost* of each item, and when that item sells, you know the sale price, the cost of that item, and the resulting gross profit derived from it. In the case of the \$1,000 sale with a cost of \$450, the gross profit would be \$550, or 55%, and the COGS would be \$450, or 45%. As each item you sell in a day, month, or year is added up, you will have a very clear picture of your Sales, COGS, and Gross Profit.

**Gross Profit** is the difference between your Sales and the Cost of the Goods Sold. In fact, Gross Profit is a far better number to track than Sales. Since the product has to be paid for, the cost of those goods is already spoken for. It's your Gross Profit dollars from which you pay your **Total Operating Expenses**, leaving you with your **Net Operating Income** (NOI).

Understanding the relationship between these five numbers provides a foundation for analyzing the financial performance of a jewelry business.

### Key Takeaways

- The Income Statement can be complex due to accounting methods and industry variations.
- Focus on understanding the five key numbers: Sales, COGS, Gross Profit, Operating Expenses, and Net Operating Income.
- Ensure that COGS only includes the cost of goods sold without additional expenses like freight. Gross Profit is a crucial metric to track as it reflects the profit after accounting for the cost of goods sold.

Income Statement	
For Rolling 12 Months Ending December 2021	
Sales Revenue	
Cost of Goods Sold	
Gross Profit	
Total Labor Costs	
Operating Expenses	
Selling Expenses	
Occupancy Expenses	
General and Administrative Expenses	
Total Operating Expenses	
Net Operating Income	



# CREATING A WELCOMING ENVIRONMENT FOR ALL CUSTOMERS

## BY THE AMERICAN GEM SOCIETY'S DIVERSITY, EQUITY, AND INCLUSION COMMITTEE

Creating a welcoming environment in your business is crucial for staying competitive in today's diverse marketplace. By fostering an environment that values varied perspectives and respects individuals' identities, you will demonstrate a commitment to inclusivity and create a space where all clients feel comfortable, respected, and valued.

As a baseline, let's define a "welcoming environment." It's one where clients feel they can be themselves and express their individuality while they are engaging in your business. It is essential if you want to attract and retain a more diverse client base.

Here are three ways to ensure your business is welcoming to everyone in your community:

- Cultivate an open mind
- Discover your unconscious bias
- Use inclusive language

### Cultivate an Open Mind

The first step you can take is to keep an open mind. Be open to fresh ideas and differing views, even when they clash with your own. Someone open-minded is curious to learn and wants to understand varying opinions and values. In their efforts to learn and grow, they seek out new perspectives.

We tend to categorize information based on our own experiences. When we come across views or ideas that don't fit those categories or challenge our beliefs, it's easier to reject the new thinking rather than be open to new thought. Some mental shortcuts include stereotyping, judging people based on individual characteristics or even a first impression, and making snap decisions.

Here are some additional tips on cultivating an open mind:

- Be honest about what you know and don't know: Acknowledge the validity of other perspectives and recognize the limitations of your understanding.
- Be curious: Seek alternative perspectives, ask questions, and listen actively.
- Expand your network: Broaden your social circle to include people with different backgrounds and ideas.
- Challenge your snap judgments: Reflect on initial reactions and consider alternative interpretations.
- Calm down: Step back and reevaluate when emotions hinder open-mindedness.
- Reframe negative thoughts: Find positive aspects in new ideas or situations.
- Embrace new experiences: Step out of your comfort zone, explore different cultures, and try new things.
- Practice mindfulness: Stay present, accept feelings, and let go of negative thoughts to enhance curiosity and openness.

### Discover Your Unconscious Bias

Unconscious bias is the unintentional and automatic judgments or prejudices individuals hold towards others based on various characteristics. It could be their race, gender, age, appearance, etc. These biases are often deeply ingrained in our subconscious and developed through societal influences, personal experiences, and cultural norms. They can affect how we perceive, interact with, and make decisions about others, even when we genuinely believe ourselves to be fair and unbiased. Unconscious bias is important to acknowledge and address as it can negatively impact relationships and opportunities, contributing to inequality and discrimination.

To counter unconscious bias, be mindful of your thoughts and behaviors. When interacting with a customer, ask yourself if your behavior is influenced by preconceived notions about that person. Here's an example: a person comes into a jewelry store and wants to buy earrings. They seem interested in some diamond drop earrings. Based on their appearance, the salesperson steers them toward something less expensive.

Maybe it's their age, how they dress, or their race. The salesperson knows nothing about this person or their background, but for whatever reason, call it instinct or, based on previous experience, thought the jewelry was out of their price range. In reality, the client could be affluent, and the cost of those diamond earrings would be insignificant to them.



## DIVERSITY, EQUITY, AND INCLUSION



Here are some tips to help you move beyond unconscious bias:

- Accept that unconscious bias is part of being human. You can't overcome it till you recognize that.
- Become more aware of your own bias. You can quickly search online for free implicit association tools to help you learn your bias.
- Question your first impressions and extreme reactions. Ask yourself why you feel a certain way. Is it justified?
- Note how you interact with bias related to protected characteristics, i.e., a person's age, if they are differently-abled, their gender, race, religion, sexual orientation, pregnancy, and maternity.
- Apologize when you are wrong. We can only deal with bias if we're honest and admit our mistakes.

One final thought on this topic: Speak out if you notice bias on your team. For example, if a male colleague frequently interrupts female colleagues, tactfully point out that you'd like to hear what the women have to say. If you feel uncomfortable, speak to your manager, or ask the person impacted if they would like your help.

### Use Inclusive Language

Using inclusive language is another way to create a welcoming environment. This means using words and phrases that respect and acknowledge the diversity of all individuals.

By consciously adopting inclusive language practices, you can foster an environment where all clients feel valued and respected. Here are some examples:

- Instead of using gender-specific terms like "fireman," which implies that only men can fulfill that role, "firefighter" is more inclusive, recognizing that people of all genders can excel in that profession.
- Don't assume pronouns; use "they" when unsure of a person's preference.
- Also, don't assume anything about relationships. Use "partner" or "significant" other rather than "wife" or "husband" if you don't know their status.
  - Let's say a man comes into a jewelry store. The salesperson might ask, "Is this for your wife?" A more inclusive approach would be, "Who are you shopping for today?" Note their language and use it. If they say, "my partner" or "my spouse," use the term they use.

A simple shift in language demonstrates an awareness of diversity and promotes equality. It helps to create an inclusive space where clients feel seen, acknowledged, and comfortable engaging with you without any assumptions or biases based on traditional gender roles.

By having an open mind, being aware of unconscious bias, and using inclusive language, jewelers can create a more welcoming and inclusive environment for all clients. This will help to ensure that everyone feels comfortable.

Here are some additional tips for creating a welcoming environment for all customers:

- Be mindful of your body language. Make eye contact with all clients and avoid making gestures that could be interpreted as offensive.
- Ask open-ended questions. This will help you to learn more about the client's needs and preferences.
- Be respectful of cultural differences. Be aware of the different cultural norms that may apply to your clients.

By following these tips, you can ensure that everyone feels comfortable working with you, and it is one more step you are taking to help to build a more diverse, inclusive, and equitable jewelry industry.



## DIVERSITY, EQUITY, AND INCLUSION



### Key Takeaways

- The first step toward creating a welcoming environment for your clients starts with keeping an open mind. This means being receptive to fresh ideas and differing views, seeking new perspectives, challenging snap judgments, and embracing new experiences. It requires honesty about one's knowledge, curiosity to learn, expanding social circles, and practicing mindfulness to enhance curiosity and openness.
- Be aware of unconscious bias. Unconscious bias occurs when we make decisions without being aware of our prejudices. This type of bias can be very subtle, often leading to discrimination. Jewelers can help create a more welcoming environment by being aware of their own unconscious biases and taking steps to mitigate them.
- Use inclusive language. Inclusive language respects everyone, regardless of race, ethnicity, gender, sexual orientation, or other personal characteristics.

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# FOSTERING SUSTAINABILITY IN THE GEM AND JEWELRY INDUSTRY: EDUCATION, TRACEABILITY, AND TRUTHFUL COMMUNICATION

BRANDEE DALLOW, GRANDVIEW KLEIN DIAMONDS, AND JOHANNA LEVY, GIA

The United Nations defined sustainable development as the “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (Brundtland Commission, 1987). In a corporate setting, Environmental, Social, and Governance (ESG) criteria look at how businesses respond to climate change, pay living wages, implement diversity and inclusion policies, build trust, foster innovation, manage their supply chains, and lead with good governance (Serafeim, 2020).

The concept of ESG aligns with the 17 Sustainable Development Goals (SDGs) launched in 2015. These 17 goals (which fit into three categories, Environmental, Social, and Governance) and 200+ indicators measure progress on global health, education, and the economy, with a large focus on helping to tackle climate change and preserve the oceans (United Nations, 2015). The United Nations report every year on the SDGs, and the 2022 report, shows that COVID-19 wiped out more than four years of progress on poverty eradication and pushed 93 million more people into extreme poverty in 2020 (United Nations, 2020).

Current events influence consumers, and 72% said that now more than before, external factors such as social movements, inflation, or climate affect their purchasing behavior (Sha, Barton, & Björnsjö, 2022). In the gem and jewelry industry, 20–30% of global fine jewelry sales will be influenced by sustainability considerations by 2025 (The Business of Fashion; McKinsey & Company, 2021). In addition, 59% of luxury customers say that the issue of sustainability influences their purchasing behavior (BCG; Altagamma, 2019).

To start your sustainability journey as a retailer, a brand, or a business owner, the first endeavor is to understand your impact—on your operations and supply chain. European laws now mandate this due diligence, and the SEC requires public companies in the U.S. to disclose their greenhouse gas emissions—including their supply chain emissions (Hodge & Jeffery, 2023). For smaller companies, free tools are available to calculate your carbon footprint (scope 1, scope 2, and scope 3) and to compare your performance with other retailers in the U.S.

Once you have completed your due diligence, you can start communicating your performance and initiatives.

When it comes to sustainability communications, nothing can be arbitrary or questioned. So, actual evidence is 100% a necessity. Don't claim that you are more than what you do. Look holistically and specifically at the same time. For example, if your ethos is to create jewelry with a limited environmental footprint, only communicate facts demonstrating your actions toward that position.

It is also important to measure and communicate using hard numbers and data. Companies that continue to speak the ubiquitous language of commitment without measurement, targets, and progress updates place themselves at risk of a public backlash. Measuring and communicating actual baselines, targets, and progress can be used as a strategy to steer clear of unsubstantiated claims. Solid measurements are crucial when controlling the operational effect and narrating progress.

Communicate in clear terms to avoid any misrepresentation. Use simple and straightforward language. Avoid ambiguous or misleading expressions such as “eco-friendly,” “green,” or “environmentally friendly,” as these kinds of statements are open to interpretation and can lead to false expressions of sustainability.

Avoid using misleading images—serene landscapes and dew drops on leaves are beautiful but have little to do with diamonds, gemstones, precious metals, and/or jewelry.

Finally, use established frameworks to back up your claims. Communicate about the sustainability initiatives you can support with data





## DIVERSITY, EQUITY, AND INCLUSION



and include the documentation in marketing communications or refer to them online.

### Key Takeaways

- Sustainability can be business-driven and consumer-driven.
- Building more sustainable organizations start with understanding operations and supply chain impact.
- The difference between traditional communications and sustainability/ESG communications is that one must provide proof, including data, to back up one's statements in the latter.

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## THE CHALLENGES OF DETERMINING DIAMOND GEOGRAPHIC ORIGIN

DR. EVAN M. SMITH, GEMOLOGICAL INSTITUTE OF AMERICA

Faceted natural diamonds in the marketplace are rarely accompanied by information about their country or mine of origin. However, there is growing interest in knowing where diamonds come from. Several research groups over the past few decades have sought to develop a way to independently determine a diamond's country of origin, but there has yet to be a verifiable method. This abstract is based on a recent article that explored this topic in detail, and curious readers are encouraged to seek it out (Smith et al., 2022).

It seems reasonable to expect that gems formed in different places should be slightly different. This could mean different types of inclusions, growth patterns, features in spectroscopy, or variations in trace element chemistry (small amounts of impurities, likened to a "chemical fingerprint"). Trace element analysis can be a powerful tool for determining where a gemstone, such as a ruby or a sapphire, comes from (Groat et al., 2019). In diamonds, however, the concentrations of most trace elements are exceedingly low and consequently more challenging to measure.

With specialized techniques, it is possible to measure the ultra-low trace element concentrations in diamond. The most promising technique is a modified "offline" version (McNeill et al., 2009) of Laser ablation inductivity coupled plasma mass spectrometry LA-ICP-MS. However, this technique is slow, expensive, and damaging, with single analyses taking days, costing thousands of dollars, and sometimes requiring the destruction of millimeters of the diamond surface. Because of these limitations, fewer than 100 high-quality trace element analyses of gem diamonds have been made to date. The results are complex but show striking similarities and overlap between diamonds from different deposits (Krebs et al., 2019). It is not an encouraging sign for the prospect of origin determination.

The analytical challenge of measuring trace elements in diamond is certainly a barrier in the pursuit of diamond origin determination, but it is not the final hurdle. Even if future technological improvements were to make the analysis simpler and cheaper, the way in which diamonds form within the earth presents a challenge as well. The geological processes and ingredients involved in diamond formation are remarkably similar around the world. Of course, there are unusual and exceptional diamonds that appear to be associated with individual mines. Moreover, if given the opportunity to examine and compare large parcels from different mines, their average properties may differ. But on an individual basis and in general, the majority of diamonds share similar geological characteristics regardless of origin.

Unlike colored gemstones, which form almost exclusively in Earth's crust, most mined diamonds originally formed 150–200 km below Earth's surface, in the oldest and thickest parts of continents within mantle rocks called peridotite and eclogite (Stachel, Aulbach, et al., 2022; Stachel, Cartigny, et al., 2022). Pieces of these mantle rocks are occasionally captured inside diamonds as they grow. We encounter the same kinds of mineral inclusions at most diamond deposits worldwide, reflecting similar diamond growth in peridotite and eclogite rocks. Given what we know about how similar the geology of diamonds can be from one mine to the next, it comes as no surprise to geologists that we also observe similarities and overlap in trace element chemistry.

In order for some level of practical origin discrimination to be possible, there must first be characteristics that are distinct between different origins. This is a fundamental requirement. Trace element analysis is regarded as the most promising for diamonds, but existing data suggest this basic requirement might not be met. It is difficult to explore this problem further without first collecting many thousands of measurements from diamonds of known origin and applying advanced statistical methods.

In summary, there has been no scientifically robust study by any method demonstrating unique and measurable characteristics that would allow for independent provenance determination of a random individual diamond (Cartier et al., 2018; Dalpé et al., 2010; Krebs



et al., 2019; Smith et al., 2022). Unfortunately, the ideal goal of determining origin independently through a lab analysis is not on the horizon. For now and the foreseeable future, the only definitive method to establish diamond origin depends on retaining country-of-origin and/or mine-of-origin information from the time of mining.

### Key Takeaways

- The main characteristics of most diamonds from around the world are remarkably similar.
- There is no verified method to determine the origin of a random individual diamond.
- Retaining origin information through the supply chain may be a viable alternative.

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## MONTANA SAPPHIRES

DR. AARON PALKE, NATHAN RENFRO, SHANE MCCLURE, GEMOLOGICAL INSTITUTE OF AMERICA

Gem-quality sapphires have been mined in the state of Montana, USA, for well over 100 years. The main gem-bearing sapphire deposits in Montana are those at Yogo Gulch, Missouri River, Rock Creek, and Dry Cottonwood Creek, with the latter three deposits being secondary sources as the gem sapphire has been concentrated through weathering of the host rock. When first discovered in the 1800s Montana's sapphire deposits were mined for use as watch bearings which carried on until after World War II.

In the 1990s, interest in Montana's secondary sapphires was revitalized by the perfection of heat treatment to improve the blue color by John Emmett and Troy Douthit in 1993. While interest in Montana Sapphires declined in the late 1990s, interest in the material has seen a resurgence, as well as renewed mining as Potentate Mining had invested in a significant mining operation in the area. The popularity of Montana sapphires has also likely increased with the use of social media. Currently, the Rock Creek and Missouri River deposits are the only secondary sources to be commercially mined, as there is little mining activity at Dry Cottonwood Creek.

Gemologically, sapphires from secondary sources in Montana are relatively easy to separate from other sources across the globe based on their inclusions and trace element chemistry. Sapphires from Songea, Tanzania, pose the most difficulty in separation from Montana sources as their inclusions and chemistry do overlap. It is also important to note that it is generally not possible to separate material from the individual secondary sources in Montana from one another.

### Key Takeaways

- Montana has been a significant source of gem-quality sapphires for over 100 years, with primary deposits at Yogo Gulch and secondary deposits at Missouri River, Rock Creek, and Dry Cottonwood Creek.
- The initial mining of Montana sapphires focused on their use as watch bearings, but interest declined until the 1990s, when heat treatment techniques were developed to enhance the blue color, leading to renewed interest in the material. The chemical composition of the growth material in melt-grown gems is the same composition as the resulting synthetic crystal that is produced.
- The resurgence of interest in Montana sapphires, including renewed mining activity, can be attributed to factors such as advancements in treatment methods and increased exposure through social media platforms.
- Gemologically, Montana sapphires can often be distinguished from other global sources based on their unique inclusions and trace element chemistry. However, separating Montana sapphires from different secondary sources within the state is generally not possible.



## GEMSTONES UNDERFOOT: GEMS FROM THE UNITED STATES; WELL-KNOWN AND NOT SO WELL-KNOWN

JOHN J. BRADSHAW, GEMOLOGIST, GEMCUTTER

When considering sources of gemstones worldwide, the United States is often overlooked by the general public and even within the gem and jewelry industry. While diamonds from South Africa or Botswana, emeralds from Colombia, Zambia, or Brazil, rubies from Burma or Mozambique, and sapphires from Sri Lanka, Burma, or Kashmir are commonly recognized, it's worth noting that the United States is home to a variety of gemstones as well. Although not always available in significant quantities, this scarcity enhances their appeal and collectability, making them enticing for retailers to offer to their customers.

Of those mentioned above, sapphire from Montana is available in commercial quantities. Operations began at Rock Creek in 2011, successfully producing enough sapphire rough to satisfy the current market. The sapphires from Rock Creek also respond well to heat treatment producing a myriad of colors. The downside of this locality is that only 2–3% of finished stones are over one carat. The famous Yogo sapphire mine re-opened in 2022 and is starting to yield beautiful blue and purple stones with no need for heat treatment. Like Rock Creek, larger stones are the exception rather than the rule.

The United States is a well-known source of tourmaline. In the early 1900s, a substantial amount of pink tourmaline from California was sold to the Empress of China during her reign. Tourmaline was first discovered in Maine in 1820, with Elijah Hamlin being one of the discoverers. His brother Hannibal Hamlin served as vice-president under Abraham Lincoln. Legend has it that tourmaline pendants were presented as gifts during the inauguration. It continues to be found today, even after more than 200 years. Production is sporadic, with most of the material sold within the state for incorporation into jewelry.

There are at least three notable single-source gemstone localities in the United States: Benitoite from San Benito, California, red beryl from the Wah Wah Mountains in Utah, and hiddenite from North Carolina. All three mines are now closed, and any faceted gems are highly sought after.

The list goes on with quartz and chalcedony of various colors, spessartite garnet, peridot, spodumene, aquamarine, sunstone, rhodochrosite, turquoise, nephrite jade, topaz, opal, and fluorite. These are only the tip of the iceberg as deposits around the country have yielded many species too numerous to mention.

### Key Takeaways

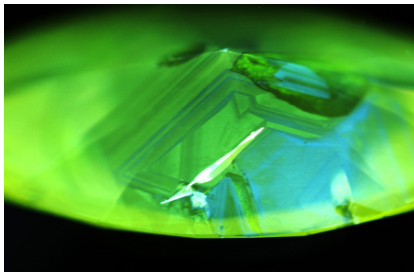
- There is a wide variety of gem materials found in the United States.
- With current emphasis on ethical and responsive sourcing, gems from the United States definitely fit that bill.
- Although many U.S. gems are not found in commercial quantities, this actually helps promote the rarity and collectability to your customers.



## FLUORESCENCE IN DIAMOND

DAVID FISHER, DE BEERS GROUP IGNITE

There has been much comment on fluorescence in diamonds, mainly associated with its alleged negative impact on the appearance and value of a diamond. However, all the serious systematic studies (e.g., Moses et al., 1997; Luo et al., 2021) into the impact of different fluorescence levels on diamond appearance universally agree that except in extreme cases, any effect is minimal and certainly not perceived by the end consumer. Factors other than fluorescence (such as clouds of visible or invisible inclusions) are the main contributors to either a haziness or poor contrast in a stone, but on many occasions, they have been erroneously attributed to fluorescence. The fluorescence in some deeper color stones can lead to a slight improvement in the observed color of a stone. Uncertainty is the main driver for discounting rather than a systematic negative impact from fluorescence.



*Figure 1 A: DiamondView fluorescence image of a natural diamond showing patterns associated with multiple periods of growth interspersed with times when the surface of the diamond was significantly etched back. Different nitrogen-related impurities cause different fluorescence colors.*

Far from being an undesirable attribute of a diamond, its fluorescence allows us to obtain otherwise inaccessible information about a diamond's growth history if viewed under the right conditions. Instruments, such as the De Beers DiamondView (Welbourn et al., 1996), allow high-resolution images of growth-related structures to be produced. The images provide insights into the natural diamond's environment and can unveil variations in conditions that led to growth periods and etching, resulting in characteristic bands in the fluorescence patterns.

Other features, such as dislocations in the crystal structure, also emit fluorescence. The images show how a natural diamond can be deformed under extreme conditions in the Earth's mantle. As customers ask more about the provenance of a diamond, it is worth considering how the information contained in a diamond's fluorescence patterns can better enable us to recount the story of a diamond's history and its remarkable journey from deep within the Earth's mantle.

Fluorescence is also a valuable feature in identifying laboratory-grown diamonds (LGDs), as the different growth environments and subsequent histories of LGDs differ hugely from those of natural diamonds. Both fluorescence and phosphorescence characteristics show significant differences. This has been used in developing a generation of instruments that enable the reliable screening of diamonds, indicating which could potentially be laboratory-grown and, in some cases (such as the DiamondView instrument), provide a traditional means of identification.

The ability to control the impurity atoms in a laboratory-grown diamond that can cause fluorescence has significant potential industrial applications. In the quest for quantum computing, the fluorescence associated with a specific atomic impurity in diamond, the nitrogen-vacancy center, is being extensively investigated.



**Key Takeaways**

- Fluorescence alone has little negative effect on the appearance of a diamond except in very extreme circumstances.
- Fluorescence imaging of diamonds reveals luminescence structures related to the growth environment and subsequent residence in the Earth's mantle.
- Laboratory-grown diamonds can have their fluorescence manipulated and controlled to enable their use in technologies such as quantum computing.

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## SUPERDEEP DIAMONDS AND THEIR SIGNIFICANCE AS GEMSTONES

DR. EVAN M. SMITH, GEMOLOGICAL INSTITUTE OF AMERICA

Scientists have invested considerable time and effort studying mineral inclusions in diamonds. Part of the aim is simply to learn how diamonds form, but a parallel goal is to gain a better understanding of the earth's inner workings. After all, there is no other mineral that comes from such a great depth and gets transported up to the surface relatively unscathed. Diamonds can contain unique information about large-scale processes, such as the evolution of plate tectonics over billion-year timescales (Shirey et al., 2011; Shirey et al., 2019).

Most diamonds originate from old and thick parts of continents, at depths of about 150–200 km. This is already an incredible depth, but some “superdeep” diamonds come from depths of 300–800 km, or perhaps more. This depth lies below the rigid upper layer of the earth known as the lithosphere, meaning superdeep diamonds originate from the sub-lithospheric mantle, where the rocks are hot and weak and slowly move or circulate through time.

The discovery of superdeep diamonds unfolded in the 1980s, when researchers first noticed that some diamonds contained so-called majoritic garnet, whose composition showed it must have come from depths greater than the typical 150–200 km region (Scott-Smith et al., 1984). Further examples of superdeep diamonds boasting a variety of other high-pressure inclusion phases were soon recognized, with some even coming from the lower mantle, beyond 660 km (see reviews by Harte, 2010; Harte & Hudson, 2013; Kaminsky, 2012; Nestola, 2017; Smith & Nestola, 2021; Stachel et al., 2005). However, in all these cases, superdeep diamonds were rare occurrences and the diamonds themselves were often small, brown, heavily fractured and included, and were not thought to be a significant constituent of the gem diamond marketplace.

A study published in 2016 radically changed that paradigm (Smith et al., 2016). This investigation focused on a particular category of diamonds whose geologic origin had previously been unclear. It encompasses diamonds with characteristics like the historic 3,106 ct Cullinan Diamond. They were named CLIPPIR diamonds, which is an acronym that captures their most notable physical characteristics. Most examples of large, colorless (D-color), type IIa (nitrogen-poor) diamonds are part of the CLIPPIR variety (Smith et al., 2017). Building an understanding of how these diamonds formed relied on studying their rare inclusions.

A systematic search for inclusions among CLIPPIR diamonds uncovered the surprising result that they contain telltale high-pressure mineral inclusions that indicate a superdeep origin, such as majoritic garnet, breyite (inverted  $\text{CaSiO}_3$ -perovskite), and other phases (Smith et al., 2016; Smith et al., 2017). They also contain unusual iron-rich inclusions, which were originally trapped in the diamond as molten, liquid metal that later solidified upon cooling. These findings mean that the Cullinan Diamond, as well as more recent high-profile diamonds such as the 59.60 ct Pink Star that sold for US\$71.2 million in 2017, are actually superdeep diamonds. Now that we have some basic understanding of the geology of CLIPPIR diamonds, the proportion of superdeep diamonds within the gem marketplace is estimated to be 1–2%, based on the prevalence of type IIa diamonds.

A related study published in 2018 showed that type IIb diamonds are also superdeep (Smith et al., 2018). Type IIb diamonds are those which are nitrogen-poor, but also characterized by the presence of a small amount of boron. The boron can impart a striking blue color, such as in the 45.52 ct Hope Diamond that is a centerpiece at the Smithsonian National Museum of Natural History.

In both CLIPPIR and type IIb diamonds, multiple lines of evidence show that they are connected to the process of subduction (Smith et al., 2021; Smith et al., 2018). This is the process whereby oceanic tectonic plates bend and dive down into the mantle. Subduction can act like a gigantic conveyor belt, carrying water, carbon, and other materials from the earth's surface down into the mantle.



Ongoing research on CLIPPIR and type IIb diamonds is continuing to unravel how subduction can trigger diamond growth and what it means for the evolution of the earth's deep interior.

This recent research over the past few years has unmasked the exciting geological backstory for some of the world's most valuable diamonds. It has also changed our understanding of superdeep diamonds. They are far more than a rare and obscure scientific curiosity and are now being recognized for their astonishing spotlight role in the gem marketplace.

### Key Takeaways

- Superdeep diamonds were once considered to be consistently small and never of gem quality, but we now recognize that some of the highest-quality gem diamonds are actually superdeep diamonds.
- CLIPPIR (more loosely, type IIa) and type IIb diamonds are superdeep in origin, likely coming from a depth of 360–750 km.
- In general, diamonds contain unique and valuable information about the inner workings of our planet.

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## THE RETAIL GEMOLOGIST: WHY DIAMOND SCIENCE MATTERS IN RETAIL NOW MORE THAN EVER

RANDY LIGHTFOOT, CGA, BAILEY'S FINE JEWELRY

Before we sell the diamond we all love and know as a gemstone, we must first understand it as a mineral. Understanding a diamond's crystal lattice defects and how this translates to specific screening techniques is vital in today's retail sphere. And while it is diligent to equip your store with one or more diamond verification instruments (DVIs), it is arguably more important to understand a diamond's crystal lattice and standard evaluation methods when screening diamonds. It is not always feasible to send every diamond to a major lab for advanced testing (i.e., tested using optical spectroscopy). Nor is it best practice to rely solely on DVIs to tell you all you need to know about the diamonds you screen. Practicing standard evaluation methods and understanding defects in a diamond's crystal lattice is of growing importance, especially in retail.

The impetus for my argument stems from the presence of lab-grown diamonds, which have presented ample hurdles in identifying the origin (natural or lab-grown) and treatment of color in natural diamonds. When you understand the four types of diamonds, their respective lattice defects become more easily understandable, and subsequently, the ease of use of standard methods follows suit. By standard evaluation methods, I mean microscopy (e.g., inclusion/characteristic identification), cross-polarized filters (CPF) (i.e., using polarized light to identify the pattern of birefringence/strain in a diamond's crystal lattice), and UV illumination both in longwave (365nm) and shortwave (~254nm) excitations.

Certain defects and their distribution within a diamond's crystal lattice (both natural and lab-grown) dictate the inclusions we observe (microscopy), strain patterns (CPF), and the various types of colored fluorescence (UV). Ultimately, defects determine a diamond's body color. By extension, once the types of diamonds and their crystal lattice defects are understood, you can arm yourself with the three standard methods I mentioned previously.

It should be known that these standard methods do not replace advanced testing required to verify a diamond's type and treatment for color. However, in most cases, these standard methods can provide strong clues to origin (natural or lab-grown) and possible treatment for color. This can provide you with higher levels of confidence when screening diamonds in the absence of advanced testing.

Think of it like this, when you identify a colored gemstone, you don't use just one tool. You do your due diligence by exhausting the tools and techniques you have available to identify a gemstone. This is the same logic behind using these standard methods, which can be used complementary to whatever DVI you have.

Keep in mind that not all DVIs are created equal. You must ask yourself specific questions and research which DVI suits your needs. To reiterate, DVIs do not replace advanced testing provided by significant labs. These devices should be used with the screening methods I mentioned above.

Of particular importance is CPF (i.e., identifying slight variances in refractive index (RI) in a diamond's crystal lattice). Even though a diamond is singly refractive, it can still contain slight variances in RI, which we can observe in the form of strain imposed on the crystal lattice. Strain can be caused by point defects (i.e., trace elements/impurities such as nitrogen, boron, hydrogen, etc.) and extended defects (i.e., a higher degree of stress imposed on the crystal lattice resultant from geologic processes or possible treatment for color).

It is generally understood that strain patterns can provide strong clues to determine if a diamond is natural or lab-grown (see photos). In certain cases, CPF can be incredibly useful, while in other circumstances command further screening. This is just like any other equipment we use to identify gemstones. Sometimes you can be certain after using just your refractometer or polariscope, while other



times, you must exhaust every technique. In any case, it is strongly advised that you use at least two or three standard evaluation methods when attempting to determine a diamond's origin (natural or lab-grown) and possible treatment for color.



Parallel, columnar strain observed in CVD-grown Diamond using diffused light (left), CPF and First-Order Red Compensator (middle), and Cross-Polarized Filters (right)



Extreme lack of strain observed in HPHT-grown diamond using diffused light (left), CPF and First-Order Red Compensator (middle), and Cross-Polarized Filters (right)



Typical smudgy, irregular strain observed in natural Type Ia(A/B) diamond using diffused light (left), CPF and First-Order Red Compensator (middle), and Cross-Polarized Filters (right)

### Key Takeaways

- Standard screening methods are vital to the identification of natural from lab-grown diamonds.
- Understanding a diamond's crystal lattice and certain defects will improve one's ability to use standard methods when screening diamonds.
- Cross-polarized filters (CPF) is a technique that utilizes polarized light to observe slight variations in RI in diamonds, thereby providing clues to origin (natural or lab-grown) and possible treatment for color.
- Standard screening methods do not replace advanced testing offered by major labs.





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## THE MICROWORLD OF SYNTHETIC GEMS

DR. AARON PALKE, NATHAN RENFRO, SHANE MCCLURE, GEMOLOGICAL INSTITUTE OF AMERICA

Synthetic gems have been produced for over 100 years and continue to be sold in the gem trade. Most synthetic gems have diagnostic inclusions that conclusively prove their laboratory-grown origin. Solution-grown and melt-grown are the two main processes used to produce synthetic gems. Solution processes precipitate crystals out of liquid growth material that has a different chemical composition than the desired product crystal. In a melt process, however, the liquid growth material and the product crystal have the same chemical composition. Flux and hydrothermal growth methods are solution processes, and flame fusion and pulling are melt processes. When solution processes are used, inclusions of the solvent are often trapped as inclusions in the stone. Irregular blebs of flux or fluids trapped in voids would indicate the stone was produced by a solution process. Melt-grown stones, on the other hand, are generally cleaner and have fewer types of inclusions that can be trapped within the stone. Typically, you might find gas bubbles and minute light-scattering particles in melt-grown stones.

The most common method to produce synthetic corundum is the flame fusion method, however, laboratory-grown corundum can be produced by flux, hydrothermal, and pulling methods, each of which would leave diagnostic inclusions indicating the growth method used.

### Key Takeaways

- Solution growth and melt growth are the two main growth processes for synthetic gems.
- The chemical composition of solution-grown gems is different than the chemical composition of the nutrient solution that they are formed from.
- The chemical composition of the growth material in melt-grown gems is the same composition as the resulting synthetic crystal that is produced.



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## JADEITE JADE VALUE FACTORS

DR. TAO HSU, GEMOLOGICAL INSTITUTE OF AMERICA

Jade has always been a fascinating gemstone which also often causes heated debates in the trade. Even the definition of jade varies depending on where the market is. From the Western world's standpoint, in modern gemology, only jadeite and nephrite are counted as jade. In oriental cultures, especially in China, the largest consumer market for jade, any stones that are beautiful can be jade. For example, moonstones have been historically recorded as jade in China.

One key difference between jadeite jade and nephrite jade is their mineral composition. While jadeite is the main mineral in jadeite jade, tremolite/actinolite is the main mineral in nephrite jade. This abstract focuses on basic knowledge about jadeite jade and its value factors, which is not as familiar to the audience in comparison to other single crystal gems.

The absolute majority of gem-quality jadeite jade is produced in Myanmar. The rough is then distributed through the annual Myanmar Gems Emporium. Chinese dealers are the main buyers at the emporium, and China's Yunnan and Guangdong are the two hubs for further distribution of the rough and manufacturing. Unlike most gems, jadeite jade is not sold by carat weight but rather by lot for rough material and by piece for finished products.

The traditional 4Cs—color, clarity, cut, and carat weight—may not be universally applicable to aggregate gems like jade and turquoise, unlike single crystal gems such as diamond and ruby. For jadeite jade, the main value factors include color, transparency, texture, clarity, and craftsmanship.

As for all colored gemstones, color is often the first and foremost value factor. Jadeite jade occurs in the whole spectrum of colors, with green, lavender, red-brown, and colorless varieties as the most popular hues among consumers. When evaluating jadeite color, we have to consider colored and colorless differently since the latter won't be affected by this factor much. What is special about jadeite color evaluation is that in addition to the three color components of hue, tone, and saturation, color distribution is another component buyers have to consider. For all hues, the purer it is, the better. Modifying hues are commonly seen, but it is more of a personal choice. For tone and saturation, similar principles as colored stone evaluation are applied. Anything too light and faint or too dark and overly saturated is not as desired. Moderate tone and saturation are more pleasant. Even color distribution is desired in all colored jadeite. Mottled colored distribution is usually not much appreciated, but it can find its own niche market if it is optimized by the design of the piece.

The transparency and texture of jadeite are highly related to each other. Both are related to mineral grain size and their interrelationship. Finer grain size and tighter connection between the grains end up with finer texture and usually higher transparency. Chinese traders use special trade terms to describe transparency. From high to low transparency, such terms are "glassy," "icy," "sticky-rice-like," "winter-melon-like," and "ceramic." As for texture, "old mine" is often used to describe finer texture, while "new mine" is for coarser texture. In practice, traders usually combine transparency and texture together as one key value factor, which is called in the trade "water." Many traders and consumers take "water" as an even more important value factor than color. This is especially true for colorless jadeite.

While clarity is one value factor for jadeite jade, it can be tricky since design can often change the view of certain clarity features to the desired appearance. If clarity features are not wisely used, it negatively affects a piece's value.



In addition to the value factors dictated by nature, craftsmanship is one critical human-dictated value factor. As for jadeite, craftsmanship includes both design and execution skills. Design involves both the creative usage of the material and creativity in aesthetics. A good design is often not enough; the carvers have to fully realize the design and skillfully execute it with outstanding detailing and polish.

Jadeite jade is a complex but attractive gemstone. It has a very special position in oriental cultures and gradually become more popular in the Western market. To master the skill of evaluating jadeite, practice is the only way to triumph.

### **Key Takeaways**

- Jadeite jade is one of the two types of jade recognized by modern gemology.
- Myanmar is the main gem-quality jadeite producer, and China is its largest consumer market.
- Jadeite jade is mainly sold by the piece, not carat weight, for the finished product.
- The main value factors are color, transparency, texture, clarity, and craftsmanship.
- Color evaluation for jadeite includes hue, tone, saturation, and distribution.
- Transparency and texture are often considered together by jadeite traders.
- Craftsmanship for jadeite evaluation includes both design and execution skills.



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## COLOR INSTABILITY IN SAPPHIRES: AN UPDATE

DR. AARON PALKE, GEMOLOGICAL INSTITUTE OF AMERICA

Color instability in sapphire is an ongoing concern in the gem trade. In the mid-20th century, it was discovered that the color of some sapphires can be enhanced with exposure to intense X-ray irradiation. X-ray irradiation can induce the so-called trapped hole coloration in these sapphires, turning near-colorless sapphires into an attractive yellow or orange. However, the color enhancement is unstable and can be identified by exposing an artificially irradiated sapphire to intense visible white light, returning the stone to its stable color. In the past, this was done in a gemological laboratory by taping a stone to a window with good sun exposure.

The problem of color instability has resurfaced in recent years when it was realized that many pink sapphires could be artificially irradiated simply with a long-wave ultraviolet (LWUV) lamp to introduce an orange color component, creating a padparadscha-like color.

This treatment is identified in the modern gemological lab with a stability test, exposing a sapphire to intense incandescent light, usually with a fiber optic illumination source. Color-unstable pink sapphires will fade back to their stable pink color after this test, but if the sapphire has an orangy-pink to pinkish-orange color after the stability test, it can pass as a padparadscha sapphire.

More recently, some sapphires have been observed that will actually gain yellow or orange color during the stability test, which is the opposite reaction expected (Figure 1).



*Figure 1: In some extreme cases, color-unstable sapphires can vary from a purplish pink color in the ground state to pure orange when exposed to UV light.*

Color-unstable sapphires represent a challenge for color grading since exposure to visible light can fade unstable orange/yellow color, while exposure to UV light (even the small component of UV in daylight or incandescent light) will create this unstable coloration. Thus, exposure to daylight or incandescent light will partially charge this unstable color component in these sapphires. This phenomenon is known in the mineralogical world as tenebrescence.

Other examples of tenebrescent materials include hackmanite, tugtupite, some zircons, and photochromic sunglasses. Another complication is that a color-unstable sapphire will also fade its color even further if left in the dark. This color can be regained when the stone is exposed to daylight or any white light with a LWUV component. Thus, a color-unstable sapphire could range from purely purplish-pink if left in the dark, to straight orange with exposure to LWUV, to a padparadscha color when exposed to white light with both visible wavelengths and a LWUV component.



*This raises a philosophical question: What can be considered the “true” color of a color-unstable sapphire?*

At GIA’s lab, the reported color for these sapphires is observed after exposure to an intense incandescent illuminant. This closely resembles the “stable” color expected when these sapphires are worn as jewelry under typical visible light.

**Key Takeaways**

- Some sapphires can gain yellow or orange color with exposure to long-wave ultraviolet light, a phenomenon called *tenebrescence*.
- Some pink sapphires will temporarily change to a padparadscha-like color with artificial exposure to long-wave ultraviolet light.
- At GIA’s lab, the reported color for these sapphires is observed after exposure to an intense incandescent illuminant. This closely resembles the “stable” color expected when these sapphires are worn as jewelry under typical visible light.





## THE RISE OF MEN'S JEWELRY: DON'T MISS OUT ON THIS LUCRATIVE TREND

JOHN CARTER, CGA, JACK LEWIS JEWELERS

The men's jewelry category is the second fastest-growing sector in retail jewelry (just behind laboratory-grown diamonds). While this can be a challenging sector to build in your business, we gathered a few experts—Brian Bogosian, King Baby Studio; David Mazer, CG, Marks Jewelers; Eric Laker, Lashbrook; Todd Cozzolino, William Henry—who agree on one simple point: You should have men's jewelry in your cases if you ever expect to achieve success.

The reason is simple when you think about it. Whether a man comes in shopping for himself or if you have a couple in your store who are there for other reasons, having something to show him in your showcase is important. After all, if you're not willing to invest in men's jewelry...why should they?

The experts also suggest that the men in our industry show how jewelry should be worn by wearing it themselves. This should be a part of our everyday wardrobe, not just when our clients and friends see us in our professional environments.

As retail jewelers, we are locally focused entrepreneurs **in** our communities. Our clients see us everywhere in our towns, from our morning Rotary Club to the grocery store, our favorite restaurants, and everywhere else in between. When they see us wearing meaningful pieces or expressing our own style, it inspires them to do the same.

It's important to find suppliers that want to collaborate and help you try new things so you can find the right mix of what appeals most to your clients. For some stores, this will be heavy gold and silver chains. For others, it will be diamond bands and other rings. And yet, for someone else, it may be exquisite pocketknives that appeal to collectors.

The essence of this is that men want special pieces they can wear and enjoy during their lifetime and have something special to pass down to their loved ones.

We are retail jewelers, which is precisely why we do what we do. Sometimes men get lost in the shuffle. It's time to start focusing on them too.

### **Key Takeaways**

- Including men's jewelry in your store is crucial for success. It is the second fastest-growing sector in retail jewelry and caters to men's preferences, enhancing sales potential.
- Retail jewelers have a local presence and influence within their communities, and by wearing meaningful jewelry, they can inspire clients to express their style.
- It's important for retail jewelers to collaborate with suppliers who are willing to work as partners. You can explore various jewelry options to find the right mix that appeals to their clients.



## **JEWELRY TRIAGE: ASSESSING THE DAMAGE THE NUTS AND BOLTS OF ANALYZING JEWELRY REPAIR AND RESTORATION**

**GEORGE FOX, CGA, FOX FINE JEWELRY**

Three aspects require attention to repair and restore jewelry effectively: clients, the jewelry, and the bench jeweler. We can maintain satisfied and loyal clients by fostering open communication, transparency, and accountability. As a retail jewelry store, our reputation and income hinge on quality work and customer satisfaction. Often, jewelry repairs and custom jewelry orders are significant income for a retailer, and the quality of this work can impact reputation. Regular communication between the bench jeweler and you ensures accurate outcomes.

Jewelry dates back to the Bizmoune Cave in Morocco as drilled shells from over 150,000 years ago. Gold jewelry from Bulgaria's Varna culture from 4100–4400 BC. There is a lot of jewelry history to cover, but we need to have a broad understanding of jewelry to assess the damage. We get to see everything from crown jewels to sentimental prizes from the bottom of a cereal box! We are always building our knowledge of jewelry history or the history of the jewelry-making process. Moreover, we are still inventing new ways to make beautiful jewelry.

Assessment involves determining the damage, its cause, and the best solution for our clients. Our aim is to restore the jewelry to factory specs or better. Through conversation, we can find a suitable remedy if the client prefers. It's important to identify if the damage resulted from an accident, wear and tear, poor manufacturing/engineering, or a previous repair. This knowledge guides the restoration process.

We rely on our senses and expertise to assess jewelry. Our hands gauge weight, whether it's solid platinum or lighter gold, while also feeling for sharp edges, broken parts, or cracks. By tapping and listening closely, our ears detect loose gems. With magnification, our eyes confirm and uncover issues like damaged gems, bent items, out-of-round rings, worn prongs, and more. Combining these observations with our education and experience will help us understand the story the jewelry is telling. This can be compared with what the client is saying, and the best solution can be found.

Keep the following in mind:

- Check the inside of a ring before sliding it onto a mandrel to avoid potential damage to gems protruding beyond the ring rail.
- Prior to steam or sonic cleaning, inspect gems for security and inform the client about the associated risks. In some cases, dirt may be the only thing keeping a gem in place.
- Avoid using “blame language” when discussing damage. Instead, ask the client about their jewelry-wearing habits, acknowledge its history and wear, and share your findings using a digital microscope or a tablet on a kiosk stand.
- During the initial assessment, acknowledge the presence of distractions and inform the client that multiple inspections occur throughout the restoration process. Additional issues may be uncovered during the process, and the client will be informed if that happens. Complete cleaning during the initial assessment is often insufficient to reveal hidden problems under accumulated dirt or worn prongs.



Before the repair take-in, write down pertinent points of the interaction with your client. These points should include:

- The name of your client
- Contact information
- Repairs to be done—this should be brief and accurate
- Any work the client has declined that was recommended. Document how that may affect the warranty, if any.
- Any client advisements, e.g., jewelry should be inspected in six months
- Condition of jewelry and damages
- Due date. Is there a special occasion involved?
- Client's declared value

With these notes in hand, we can easily enter the information into our POS system. Pictures should be taken from various angles, including top, finger view, and close-ups of damaged areas.

In jewelry assessment, wear is often determined by rubbing. Chain ends, links, and contact points wear over time and may require replacement or building up. Diamonds hanging over their ring mounting create grooves on an adjacent ring, and pendant bales can be sawn through by the chain. Plated items can be identified by color differences at rubbing edges. Hinges also wear due to constant turning and rubbing.

Prongs and channels on rings wear from constant rubbing but can be built up. Impact on prongs can lead to stress fatigue, and failure. Metal or solder overheating during casting causes cavities and increases prong susceptibility to fatigue.

Sizing failures, where a ring breaks at the solder joint on a shank, are caused by “cold soldering.” This is where the solder flows around the perimeter of the join and not completely through the join. This can be seen under magnification by file marks inside the flowing margins of the solder perimeter. The lack of flow of solder can be caused by two things: an unclean prepared join or the join is not tight prior to solder.

Another cause for sizing seam failure is when a bench jeweler creates a “butt” join and uses a laser welder, falsely expecting the laser welder to penetrate a 1 mm to 2 mm thick shank. We can identify the failed laser welding seam by the perimeter of the join. The center will be identical to the soldered join and the perimeter of the join is uniform in depth, resembling a miniature welding bead.

In conclusion, while this abstract only scratches the surface, it serves as a starting point for a successful jewelry assessment.

### **Key Takeaways**

- Learning jewelry assessment is a career-long process.
- We need to communicate continuously with our clients and jewelers throughout the repair and restoration process.
- Prepare a thorough repair document.
- Keep the client informed if other damage becomes apparent after it is taken in.



## THREE JEWELRY MARKETING CHECKLIST ITEMS

LARYSSA WIRSTIUK, JOY JOYA

In preparation for the busy holiday season and to plan for the year ahead, assessing your current approach to business and making strategic adjustments will help you achieve your current goals and consider new ones. Whatever you imagine is within the realm of possibility.

Are you ready to adopt a clear and optimistic perspective about what's attainable for your jewelry business? Now's the time to get honest with yourself and implement action steps that will move the needle significantly. Continue reading this article for three marketing checklist items to set you up for the success.

### 1. Conduct a SWOT Analysis

The acronym "SWOT" means "Strengths, Weaknesses, Opportunities, and Threats." The SWOT analysis exercise is especially effective when you can perform it with your trusted team members during a reflective, goal-setting meeting. That way, you can gain perspectives from multiple people involved in your business operations. All jewelry businesses, no matter how successful and at every stage of growth, have things they do well, things they can improve, opportunities to seize, and threats to monitor.

When you're evaluating your strengths, ask yourself questions like:

- What do we consistently do well?
- What do we do better than our competitors?
- What are our strongest internal resources?
- What seemed to work best in 2022 and thus far in 2023?

When you're evaluating your weaknesses, ask yourself questions like:

- What resources are we lacking?
- What's holding us back from achieving our goals?
- Do our customers truly understand what makes us unique?
- What makes us feel self-conscious or insecure about our positioning?

It's one thing to seek existing opportunities, and it's another to create opportunities for your jewelry business. Ask these questions:

- Could you serve underserved customers who aren't accepted or "seen" at other jewelry stores?
- How can you lean even more into your brand identity to make a powerful and unforgettable statement?
- Is it possible for your business to align with a niche customer demographic more specifically?
- What approach to marketing have you never tried before?

When evaluating your threats, you shouldn't be hyper-focused on your competition. However, you need to know what's happening in the marketplace.

- Do you regularly check in with the industry?
- Are you aware of the trends in consumer preferences and behavior?
- Are you operating as you always have?



- Could you be doing anything to create a “blue ocean” for your jewelry business by making the competition irrelevant and carving out uncontested market space?
- Are you aware of any external factors (i.e., the economy) impacting purchasing decisions?

## 2. Set SMART Marketing Goals

When you assess the goals you'd like to achieve for your jewelry business, you'll want them to be “SMART,” an acronym for “Specific, Measurable, Attainable, Relevant, and Time-based.” A lack of specificity is one of the biggest mistakes jewelry entrepreneurs make when setting their marketing goals. If you don't know exactly what you're hoping to achieve, then breaking down that larger, year-long goal into manageable milestones will be impossible. Specific goals usually involve numbers so that you can measure them in regular intervals, typically weekly or monthly.

Choosing and defining your goals will be based on your business's past performance and external factors like the economic climate. It's fine to “dream big,” but goals should also feel attainable; you don't want to set yourself up for failure. In addition, goals should be relevant to your stage of growth and your current business activities. For example, if you recently launched an email marketing program, your goal may not be focused solely on generating revenue via email. First, you'll want to set goals around converting new email subscribers and optimizing your email campaigns. Finally, goals should have start and end dates. If you don't create urgency around achieving a goal, it's too easy to avoid implementing a plan to generate momentum.

Once you've established your SMART goals, you'll want to make sure that anyone involved is aware of the goals and knows the plan and the ways you'll measure progress. Be forgiving with yourself and your team if you miss milestones, and instead, take time to reassess and adjust your goals as needed. As Brian Tracy says, “There are no unrealistic goals, only unrealistic deadlines.” Be realistic, and don't get discouraged.

## 3. Check-in With Your Target Customers

When did you last perform a customer survey or ask your top customers for valuable feedback? Even in the past three years, through the COVID-19 pandemic and beyond, consumer shopping preferences have changed drastically. So, what you think you know about your ideal customer based on information from the past may not be true in the years ahead.

If you've never created customer personas for your business, now is a great time to map out detailed profiles of whom you're trying to reach and convert. Not only will you want to include demographic information, but you'll also want to address questions like:

- What are their favorite brands?
- What is their preferred way to shop?
- How do they research major purchases before buying?
- What do they expect from a jewelry store experience?
- How do they spend their time online?

If you feel uncertain, you can start by making educated guesses about the answers to some of these questions. Then you can re-evaluate the answers regularly as you gain more feedback about your customers via your salespeople and other team members, who can be trained to ask questions in sales conversations casually.

The path to success is to have real clarity about what has and hasn't worked in the past, where you currently stand, and where you hope to go. Many jewelry entrepreneurs shy away from tackling the above three checklist items because doing so may require change within their business. Change can be challenging, but it can also be the key that unlocks dreams.

### Key Takeaways

- **Conduct a SWOT analysis:** Evaluating your Strengths, Weaknesses, Opportunities, and Threats will provide valuable insights for your jewelry business. This analysis should involve your trusted team members to gain multiple perspectives.
- **Set SMART marketing goals:** Ensure your goals are Specific, Measurable, Attainable, Relevant, and Time-based. Specificity, measurability, attainability, relevance, and setting deadlines are crucial for effective goal setting.
- **Check-in with your target customers:** Regularly gather customer feedback to stay updated on their preferences and shopping habits. Create customer personas and address important questions to understand your ideal customers better.



# COLLABORATIVE STORYTELLING: WHY BRAND IDENTITY MATTERS TO YOUR CLIENTS

BRECKEN FARNSWORTH, CG, AND JONATHAN FARNSWORTH, CG, PARLÉ JEWELRY DESIGNS

Building a strong brand identity, understanding clients, and effective marketing are the foundations of every supplier's and retailer's success. In this abstract, we'll explore the transformative steps that can help you create a brand identity that truly shines, define your target clients, and market to them in a way that resonates with your shared core values.

## Crafting a Compelling Brand Identity

To build a compelling brand identity, start by defining your values. What principles drive your business? What sets you apart from the competition? Identifying your core values provides the foundation for your brand identity.

Next, share authentic stories that resonate with your audience. Connect with them by highlighting your journey, milestones, and experiences that reflect your values. Authenticity builds trust and fosters strong emotional connections.

Establishing a unique brand voice is crucial. Develop a distinct tone and style of communication that aligns with your brand identity. Whether playful, sophisticated, or informative, your brand voice should consistently reflect your values and resonate with your target audience.

## Understanding Your Target Clients

To effectively market to your clients, start by conducting comprehensive market research. Dive into your target audience's demographics, preferences, pain points, and aspirations. This knowledge helps you tailor your messaging and offerings to their specific needs. If you don't know how to do this, ask for help! Look for a marketing firm within the jewelry industry to do this work for you.

Create detailed buyer personas that represent your target audience segments. These personas provide a deeper understanding of customer characteristics, motivations, and buying behaviors. With this information, you can craft targeted marketing strategies that resonate with each persona.

Engage in conversations with your existing clients. Seek their feedback and understand why they choose your brand, what they value, and how you can improve. These conversations provide invaluable insights into customer needs and preferences.

## Adapting Messaging for Different Customer Segments

Analyze your customer segments to identify their unique needs and motivations. By understanding each segment's pain points, aspirations, and desires, you can adapt your messaging accordingly.

Craft targeted communications that speak directly to each customer segment. Whether it's through storytelling or highlighting specific product benefits, tailor your message to resonate with their interests. Personalized messaging creates stronger connections and boosts engagement.

## Effective Marketing Channels and Strategies

Choose the right marketing channels that align with your target clients' preferences and behavior. Consider leveraging social media





platforms, search engine marketing, content marketing, email campaigns, or traditional advertising. Each channel serves as a valuable touchpoint to engage with your audience.

Leverage data and analytics to measure the effectiveness of your marketing campaigns. Analyze the data to identify which channels and strategies yield the best results. With this information, you can optimize your marketing efforts for better returns on investment.

### Consistency and Cohesion Across Touchpoints

Maintaining brand consistency is essential for building trust and fostering loyalty. Ensure a cohesive brand experience across all touchpoints. From your website design and social media presence to customer service interactions and physical store ambiance, strive for consistency in messaging, visuals, and overall brand experience.

Deliver a memorable experience at every customer touchpoint. Pay attention to details and go the extra mile to exceed their expectations. By consistently delivering a positive and memorable experience, you reinforce your brand identity and strengthen customer loyalty.

Building a compelling brand identity, understanding your target clients, and marketing to them effectively are essential for business success. By following these practical “how-to” steps, you can craft a brand that resonates, connect with your clients on a deeper level, and drive sustainable growth. Embrace these strategies, continually refine your approach, and watch your business thrive in today’s competitive marketplace.

### Key Takeaways

- **Define Your Brand Identity:** Craft a brand story that authentically represents your values, purpose, and unique selling proposition. By communicating your core values and establishing a distinct brand voice, you can forge a deep connection with your audience and differentiate your business from competitors.
- **Understand Your Target Clients:** Conduct market research and create detailed buyer personas to gain insights into your clients’ needs, preferences, and motivations. This knowledge enables you to tailor your messaging and offerings to resonate with their interests, increasing engagement and conversion.
- **Implement Effective Marketing Strategies:** Choose the right marketing channels that align with your target clients’ behavior and preferences. Leverage data and analytics to measure campaign effectiveness, optimize your efforts, and maintain consistency across all customer touchpoints for a memorable brand experience.





# DIGITAL MARKETING METRICS THAT MATTER FOR JEWELRY RETAILERS

LARYSSA WIRSTIUK, JOY JOYA

In today's digital age, having a robust online presence and leveraging digital marketing strategies is crucial to staying competitive. But without clear metrics and tools to track your performance, you'll find it challenging to understand the effectiveness of your digital efforts and then be able to optimize accordingly.

In this article, I'll be sharing a refresher on KPIs, a list of common KPIs for digital marketing and website performance, where you can find these metrics and some action items for success.

## Refresher: What's a KPI?

A KPI is a data point you've chosen as the metric that will help you determine whether or not you're moving closer to or further away from your marketing goal. In this digital age, you'll always have an overwhelming amount of marketing data at your fingertips—more than you'll know what to do with and certainly more than you'll want to see. For digital marketing success, you'll want to get laser-focused on the KPIs that matter for your specific objectives.

You'll also want to set realistic goals for your KPIs, and it's crucial to set challenging yet attainable objectives. To do this, you may consider using the SMART goal-setting framework, which stands for Specific, Measurable, Achievable, Relevant, and Time-bound. Using this framework, you can create clear, actionable goals that provide a roadmap for achieving success.

For example, if your big-picture goal is to collect more data about your website visitors and to establish relationships with them, then you'll probably want to set a SMART goal around your email signup form: "By the end of six months, I want to improve the conversion rate of our email signup form by 20% and add 1,000 new subscribers to our email list." The KPIs in this instance are the conversion rate for your email signup form and a number of new subscribers. The revenue you earn from email marketing is a nice bonus, but it's not currently your area of focus with this particular goal.

## Common Digital Marketing KPIs for Jewelers

One of the reasons that jewelry marketing is so complex is that there are countless possibilities when it comes to KPIs. Every jewelry business is different, and the KPIs that matter most will depend on various factors, such as the target audience, product offerings, and marketing objectives.

To truly succeed in jewelry marketing, it's crucial to take a personalized approach and identify the KPIs most relevant to your specific business. This means taking the time to understand your target audience, your product offerings, and your overall marketing goals. Once you have a clear understanding of these factors, you can start to identify the KPIs that matter most and develop a data-driven approach to achieving your objectives.

I like to break down common KPIs into four objective-based categories that represent the typical jewelry buyer's journey:

1. Brand awareness
2. Engagement
3. Conversion



## 4. Retention or repeat customers

Every jewelry business has at least one of these objectives in mind, with larger businesses likely focusing on multiple objectives at once.

For brand awareness, the goal is to get more of your target audience aware that you exist as a retailer. If that's your focus, you'll want to pay attention to brand awareness KPIs. Some examples of these KPIs are:

- Website Traffic – The number of users who visit the website
- Social Media Engagement – Likes, reactions, comments, saves, shares
- Search Volume Traffic – The number of times your brand name and/or proprietary product(s) get searched on Google

Engagement means you already have some brand awareness, but now you want to build relationships with your audience and turn them into loyal fans. If that resonates with you, keep an eye on KPIs like:

- Total Email Signups or Email Signup Form Conversion Rate
- Email Click-Through Rate
- Time Spent on Website
- Number of Pages Visited/Session
- Traffic to Your Website Referred by Social Media
- User Demographics
- Device Used to Browse/Shop Website

Tracking the KPIs listed above can give you insight into how engaged your visitors are with your content and products and whether they're finding what they need on your website.

Conversion is all about increasing sales and targeting those loyal fans who are already hungry for your products. These are KPIs related to e-commerce conversion:

- Conversion Rate – Percentage of website visitors who make a purchase
- Average Order Value – Average value of purchases made on your website
- Abandoned Cart Rate – Percentage of users who add to cart and then abandon it

Retention is the last objective, where you're focusing on keeping your existing customers coming back for more and building a core group of true fans. "Percentage of returning users to your website" is one KPI that can be used to gauge retention.

### Where to Find Your KPIs

The digital marketing and website-related KPIs discussed in this article are accessible through various platforms, such as Google Analytics 4, your website's analytics dashboard, Meta Business Suite, and your email marketing platform. I suggest consolidating your relevant KPIs onto a centralized marketing dashboard that you can review monthly. To simplify the process further, consider creating a "cheat sheet" with screenshots and instructions to facilitate easy access to your KPIs.

To make the most of your marketing initiatives, setting specific and measurable goals is essential. This allows you to assess your current standing and take the necessary steps to make informed, data-driven decisions for the future.



### Key Takeaways

- Tracking and analyzing digital marketing KPIs helps jewelry retailers understand their online presence and make data-driven decisions by focusing on relevant metrics and utilizing tools like Google Analytics.
- Personalizing the selection of KPIs based on the target audience, product offerings, and marketing objectives improves engagement, conversions, and customer retention for jewelry businesses.
- Setting clear and measurable goals using the SMART framework, regularly reviewing KPIs, and consolidating them onto a centralized marketing dashboard optimizes digital marketing strategies and drives long-term business growth for jewelry professionals.



## THE NEW WAVE OF SOCIAL MEDIA: LEVERAGING TIKTOK, REELS, AND SHORTS FOR THE JEWELRY INDUSTRY INTRODUCTION

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The digital landscape has transformed significantly, and short-form video content on social media platforms has emerged as a highly effective marketing tool. TikTok, Instagram Reels, and YouTube Shorts increasingly dominate the market, offering new opportunities for jewelry industry professionals. We explored the defining elements of short-form videos; here are practical tips for creating engaging content tailored to the jewelry industry.

### Defining Elements and Tips for Creating Short-Form Videos

According to Exact Media, short-form videos have become the preferred format for 85% of marketers, as they are highly effective for lead generation, engagement, and achieving viral status. To create captivating short-form videos, jewelry professionals should consider the following tips:

1. Shoot vertically: Opt for a 9:16 aspect ratio to make the content easily viewable on mobile devices.
2. Use a tripod: Stabilize your smartphone with a tripod to improve video quality.
3. Leverage platform-specific tools: Utilize each platform's unique features to enhance your videos.
4. Be authentic: Showcase your brand's personality and communicate your message genuinely.
5. Consider timeliness: Align your content with current trends, events, and promotions.
6. Plan transitions: Smooth transitions can make your videos more appealing and professional.
7. Use captions effectively: Include captions to ensure accessibility and improve audience understanding.

### Understanding and Interacting with Platform Algorithms

Each social media platform's algorithm determines content visibility and reach. To optimize your short-form video content, it's crucial to understand these algorithms and engage actively on each platform. Spend time commenting, liking, and interacting with users to improve your content's performance within the jewelry community. Optimize your profile bio to communicate your brand identity and expertise effectively.

### Strategies for Short-Form Video Creation

To ensure your short-form video content aligns with your business goals and values, consider implementing the following strategies:

1. Develop evergreen themes: Create content that remains relevant over time, such as messages of love or fashion passion.
2. Focus on event/promotion themes: Set expectations and feed into the fear of missing out (FOMO) by highlighting upcoming events or promotions.



3. Follow trends: Watch popular music, topics, and transitions to make your content more appealing.

### Tips for Jewelry Industry Professionals

To excel in the short-form video space, jewelry professionals must create valuable content that educates, inspires, and showcases their unique perspectives. Consider sharing behind-the-scenes footage, debunking myths, and providing helpful tips. Some examples include:

1. Behind-the-scenes: Share live footage from the jewelry repair bench or the process of repairing/re-faceting diamonds and gems.
2. Educate: Explain the differences between various gold karats and metal types or offer a diamond buying guide covering lesser-known topics.
3. Debunk myths: Address misconceptions about jewelry pricing, valuation, and diamond authenticity.
4. Helpful tips: Offer advice on cleaning jewelry at home, traveling with jewelry, and maintaining jewelry items.

### Platform-Specific Practices

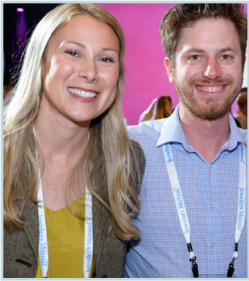
To make the most of TikTok, Instagram Reels, and YouTube Shorts, it's essential to understand each platform's unique specifications (vertical versus horizontal), practices, jargon, and demographics. Some platform-specific recommendations include:

- TikTok: Edit videos within the app, stay active in comments, use trending hashtags and sounds, and post daily.
- Instagram Reels: Use platform templates, don't recycle content from other apps, and incorporate trending music and hashtags.
- YouTube Shorts: Ensure your channel includes long-form videos and shorts, focus on SEO, and create custom thumbnails.

Short-form videos on social media platforms like TikTok, Instagram Reels, and YouTube Shorts have revolutionized the marketing landscape for the jewelry industry. Jewelry professionals can create engaging and successful content that resonates with their target audience and drives business growth by understanding the defining elements of short-form videos, interacting with platform algorithms, implementing effective strategies, and utilizing platform-specific practices.

### Key Takeaways

- Short-form videos on platforms like TikTok, Instagram Reels, and YouTube Shorts have become highly effective marketing tools, offering new opportunities for the jewelry industry to reach and engage their target audience.
- Implementing strategies like developing evergreen themes, focusing on event/promotion themes, and following trends can ensure that short-form video content aligns with business goals and values.
- Understanding platform-specific practices and demographics and engaging actively on each platform is crucial for optimizing short-form video content and maximizing reach within the jewelry community.



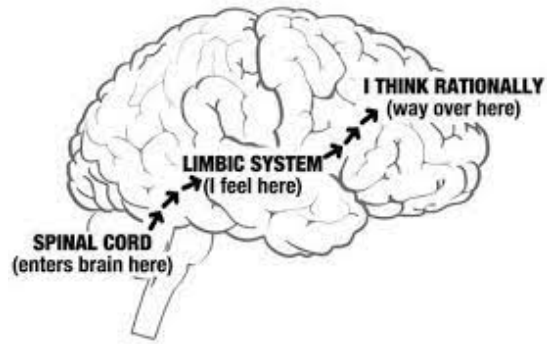
# EMOTIONAL INTELLIGENCE IN SALES

ANDY MARTIN AND CARIN MARTIN, WISHFLUENCE

Emotional intelligence (EQ) is essential for better connections with others, effective decision-making, staying calm under pressure, resolving conflicts, and experiencing greater work satisfaction. According to Dr. Travis Bradberry and Jean Greaves (*Emotional Intelligence 2.0*), people with high EQ tend to earn \$30,000 more than those with a low EQ. In sales, emotional intelligence helps position sales professionals as trusted advisors by enabling them to stay calm and guide the customer experience.

Our brain processes information by first receiving stimuli through the spinal cord, which then triggers emotional reactions in the limbic system. Rational thought takes place in the frontal lobe, but our brains instinctively feel and react before engaging in critical thinking. Further, rational and critical thinking skills do not develop fully until the age of 25. Enhancing emotional intelligence allows for rational responses to situations, reducing reactive behavior.

EQ tests assess strengths, areas needing attention, and areas to prioritize for practice. Emotional intelligence can be divided into personal and social competencies. Personal EQ skills include self-awareness and self-management, while social EQ skills involve social awareness and relationship management. Customer relationship management is crucial in sales and differs from general relationship management.



Picture: Bradberry & Greaves, 2009.



Self-awareness enables recognizing emotions, body sensations, and triggers. A lack of self-awareness can hinder team success, increase stress, and decrease motivation. Tools such as journaling and assessing values with behaviors for congruency help cultivate self-awareness.

Self-management involves transitioning from reactive to responsive behavior through self-regulation. It allows for adaptability, enthusiasm, and motivation in one’s job. Breathwork, positive self-talk, and having plans and processes with digital tools contribute to effective self-management.

Social awareness encompasses reading social cues, adjusting behaviors, and understanding others’ emotions. Empathy plays a significant role in social awareness. It facilitates effective communication, collaboration, coaching, and decision-making. Greeting people by name, active listening, and providing feedback are essential practices for social awareness.

Relationship management involves developing strong connections and trust over time. It requires time, frequent interactions, consistency, and effective communication. Unaddressed conflicts can waste company time and decrease morale. Building idiosyncratic credits through reliable actions fosters strong relationships.

Customer relationship management is leveraging relationships, customer knowledge, and product expertise. It requires consistent communication and personalized interactions. Automation aids but cannot replace genuine communication. Handwritten notes and



utilizing various platforms to meet customers' preferences enhance customer relationship management.

By practicing emotional intelligence and developing these skills, individuals can improve their interactions, enhance decision-making, and foster more satisfying relationships.

**Key Takeaways**

- Emotional intelligence (EQ) is essential for better connections with others, effective decision-making, staying calm under pressure, resolving conflicts, and experiencing greater work satisfaction.
- Your emotional intelligence can be practiced and improved over time.
- There are digital tools to help with some of these skills, such as task organizers, calendars, communication platforms, notes, and reminders. Mobile is best so information can be at your fingertips.





## SPEAK THEIR LANGUAGE: CONSULTATIVE SELLING FOR TODAY'S JEWELRY BUYER

JAMES (JIMMY) DEGROOT, TRAIN RETAIL LLC AND THE JEWELRY STORE TRAINING INSTITUTE

To maximize our effectiveness as sales professionals, we need to adapt to each client's buying style. By paying attention to clues and using their preferred communication style, we can increase our chances of closing the sale and delighting the client, even in ways they may not fully comprehend but will appreciate. Here are four selling styles for different types of clients:

### FUN

A woman enters your store wearing vibrant, trendy clothing. Sporting a beaming smile and speaking with confidence, she exudes a sense of fun and excitement. We would refer to her as a "fun" person and employ fun techniques and words such as "really," "gorgeous," "exciting," "great," or "blast" to communicate in her style. Our conversation with her would likely focus on her and something exciting in her life; perhaps it is the reason that brought her to your business. Give this person an audience. Allow others to come in or around the sale to comment on what she's looking at buying. Fun people love an audience and love being appreciated for how they act. Unless she inquires about technical details, focus on keeping the conversation fun and light, guaranteeing a successful customer interaction.

### PEACE

A man walks in and keeps to himself. He's cordial yet reserved. His attire and hairstyle are modest and conservative. Unlike our lively woman, he seeks neither an audience nor conversation. Above all things, he wants the engagement ring he buys to be one his partner will love and doesn't want her to be unhappy with any aspect of it. His goal is peace, meaning he seeks to avoid conflicts and derive happiness from satisfying his partner. He appreciates sensitivity for feelings and loves words like, "worry-free," "chill," "relax," "easy," "smart," "respect," and "low maintenance." An aggressive approach would discourage him from purchasing; a gentle and delicate approach is needed. If he gives a review after his purchase, he's very likely to describe you as "easy to work with."

### CONTROL

A woman comes in because the prongs of her ring are catching on her clothing. She's abrupt and may appear in a hurry; perhaps her behavior is rude. She's busy with things to do and wants this problem checked off her list. Respect her time. Minimize small talk and explain the necessary steps to repair the ring while presenting the option of preventing future problems through a new head or a palladium/platinum upgrade, for example. Consider her satisfaction and use terms like "accomplish," "get it done," "we'll take care of this for you," "appreciate," "control," and "achieve." Avoid overwhelming her with unnecessary details; provide choices and pricing so she can decide. Whether she seeks merchandise or needs a repair, she prioritizes practical problem-solving to instill confidence in the swift handling of her concerns.

### PERFECT

A man comes in with a printout of Tolkowsky's dimensions of an ideally cut diamond from the internet. He may have other diamond-related papers from online shopping, demonstrating his thorough research. He's not interested in the same things that the "fun," "peace," and "control" people are interested in, so don't use their messaging. This person is interested in getting it right; in fact, he wants it "perfect." If you are one of the other categories described above, you'll need to slow down and focus on the details because that's exactly what this customer is interested in. Use words or phrases like "perfect," "get it right," "details," "assured," and "guaranteed." These people love appreciation for how they've thought things through and the time and attention to detail they have.



For these people, don't be in a rush to close the deal. They don't mind taking the time if it means getting it right. Getting it right makes them tick, and they thrive on it.

In summary, pay attention to your customers' motivations. Observe and listen for cues on how they prefer to be addressed and treated. While we may already do this, having quantifiable information can boost our sales closing ratios. We can often fall into selling habits that may only truly speak to 25% of our customers. By focusing on understanding our audience, we can speak their language, leading to increased sales and lifelong advocates. When customers encounter this personalized approach, they'll think, "These people really get me!"

**Key Takeaways**

- To maximize effectiveness as sales professionals, it is crucial to adapt to each client's preferences and communication style. Paying attention to clues and using their preferred language can significantly increase the chances of closing a sale and delighting the client.
- Recognize different customer types, such as "fun," "peace," "control," and "perfect," and adjust your messaging accordingly. Use appropriate techniques, words, and attitudes to effectively connect with each customer type and ensure a successful interaction.
- By understanding and catering to customers' unique motivations and preferences, sales professionals can enhance their closing ratios and build lasting customer relationships.



# SPY GAMES: HOW TO DECODE PERSONALITY TYPES

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Personality tests are interesting, but often limit participants to looking inward and categorize them into set boxes.

We developed our course based on an article we read years ago that looks at four main types and allows for fluctuation depending on what happens in each person's day, life, and relationships.

Here is a snapshot of the breakdown:

## The Alpha Worker

- The backbone of the business and an expert delegator.
- Encourages teamwork, is strategic and efficient, and stays up on the latest technology and trends.
- The Alpha takes responsibility for mistakes.
- **Traits:** A leader, decisive, visionary, team player. Can be stubborn, closed to other people's ideas, and impatient.
- **Conversational Tips:** Avoid telling an Alpha you don't know when you will finish a project, giving a vague answer such as "soon" or that you will "try" to accomplish something. Stay specific. Share what you know and give a time when to expect the rest.
- **Body Language:** Exudes a combination of confidence and impatience.
  - Great posture.
  - People notice when Alphas enter the room.
  - Great eye contact
  - If you are an Alpha, avoid finger-pointing, constantly checking your watch/phone or folding arms across your chest when mentally done with a conversation.

## The Solo Player

- Can multi-task as long as working solo. Prefers his/her own company.
- If the solo player isn't interrupted, he/she will finish work on time.
- When there is a mistake, a solo player thinks it wouldn't have happened if he/she had done it alone.
- **Traits:** Works best alone, efficient, reliable, multi-skilled. Can be closed-minded to working with others, impatient, and can believe his/her way is the only way.
- **Conversational Tips:** Avoid words and phrases such as "Let's collaborate," "Let's work together," "How about we partner," or other group-related language. Instead, focus on the Solo Player's role. For example, "I'm counting on you to take the lead."



- **Body Language:**

- Stands with confidence. While not afraid to be center stage, the Solo Player is also content out of the limelight.
- Appears more confident talking one-on-one than in a group.
- Solo Players tend to point, check their watches/phones, cross their arms, and can break eye contact when they are finished spending time with you.

**The Middler**

- Does not take initiative and is indecisive.
- Not great at time management as a result of saying yes to everyone. A people pleaser.
- Great at taking orders and completing tasks as long as someone else will take the fall if there is a mistake.
- **Key Traits:** Diligent, good with people. Requires affirmation. Willing to do tasks others don't want to do.
- **Conversational Tips:** Avoid making a Middler feel like they do not have a support system. Let a Middler know that you will have their back. A Middler's productivity will increase if he/she feels supported.
- **Body Language:**
  - Middlers often sit in the middle or back of the room.
  - Posture may not be good.
  - Middlers often use hand motions that make others feel welcome, such as open palms.
  - Eye contact is not a forte.
  - Crosses arms for security purposes.

**The Whiner Shirker**

- Does not take initiative or orders.
- Completes projects late and relies on others to get the job done.
- Whiner Shirkers dodge responsibility when there is a mistake.
- **Key Traits:** Low productivity, office gossip, avoids work, good networker but doesn't follow through.
- **Conversational Tips:** A Whiner Shirker will be more open with you if you avoid sounding overly optimistic. Since Whiner Shirkers have a lot of insecurities and feed off of gathering intel, if you need to know something, tell the Whiner Shirker, "I'm counting on you to get to the bottom of this."
- **Body Language:**
  - Lack of eye contact.
  - Frowns and rolls eyes.
  - Arms crossed when annoyed.
  - Knows how to turn on the body language charm.

While personality tests provide valuable insights, sometimes they confine us to predefined categories. Understanding different types like the Alpha Worker, Solo Player, Middler, and Whiner Shirker can improve our communication skills and navigate workplace dynamics more effectively. Though these snapshots can be useful, we should always recognize the complexity and individuality of each person beyond these descriptions.



**Key Takeaways**

- Most people do not fit into a single personality box.
- Understanding other people’s personalities will help you find the best ways to connect with them.
- The words we use with different people can draw them in or repel them, depending on their personality type.
- Observe each person’s body language, and you will have a stronger sense of how to best interact with the person.



## WHY THE SALE BEGINS AFTER THE SALE: IT'S NOT "ONE AND DONE"

ELLE HILL, HILL & Co.

The sale is not the finish line.

The most significant reason the sale is not the finish line comes down to one thing: Basic math.

The cost of acquiring a client is much higher than keeping one if you're doing it right. The cost of acquiring a new customer is higher than retaining an existing one; investing in customer relationships after a sale leads to lower client acquisition costs.

If the sale is the finish line, there is a very high cost of client acquisition: advertising, marketing, the money that you pay the people that work in your store, the champagne that you pour, the boxes, and the cost of goods. And if you get one sale and celebrate it as the finish line, the acquisition expense becomes a high percentage of that sale.

If we take that sale as the starting block and build a relationship with this client, they may return because they enjoyed the first interaction. We could potentially become their lifelong jeweler. The client acquisition cost is reduced over time, allowing us to allocate more funds for further investment.

Deepening the client relationship is crucial for enhancing the customer journey and increasing sales. It offers several benefits, including enriched customer profiles that provide personalized experiences. By understanding customers' preferences and personal information, such as important dates, i.e., anniversaries, birthdays, graduations, etc., you can tailor their experiences, including reaching out to them to see if you can support them in celebrating their life's moments. This strategy can lead to larger profits as you've increased revenue while decreasing expenses.

Further, deepening the client relationship leads to higher average order values and increased customer lifetime value, yielding valuable customer data. Repeat customers tend to purchase higher ticket items, boosting confidence in your brand and reducing client acquisition costs.

Investing in the client relationship also improves customer loyalty, resulting in repeat purchases, positive reviews, and word-of-mouth recommendations. Providing exceptional experiences beyond the initial sale fosters strong bonds and encourages loyalty.

The customer journey consists of five steps. It begins with the customer's idea to buy jewelry, influenced by personal needs, promotions, special occasions, or inspiration from sources like social media.

The next step in the customer journey is "information" gathering. Retailers must identify where customers seek information and ensure their presence in those channels. Around 60–80% of the customer's journey occurs online. Customers rely on platforms like Google search, Amazon, websites, recommendations from friends, reviews, testimonials, and social media to gather information and validate their decision to purchase from you. Thus, maintaining a strong online presence becomes essential.

Once customers have gathered information, they move to the "buying" stage. Accommodating their preferred purchasing methods and creating a pleasant buying experience is crucial.

After the purchase, the "receive" stage presents an opportunity to enhance the customer's experience. Measures like sustainable packaging and personalized attention contribute to their post-purchase satisfaction.



The “recommend” stage follows, where satisfied customers become potential brand evangelists. Encouraging reviews and referrals and leveraging platforms like Trustpilot enhances your reputation.

During the sale, gathering customer information is vital for personalization. Understanding their preferences, past purchases, and important dates helps tailor recommendations and provide a memorable experience.

After the sale, follow up with the 3:3:3 rule—follow up 3 days, 3 weeks, and 3 months after the first interaction. This maintains a positive connection with the customer. Use preferred channels to express care and interest without focusing on selling.

Transactional emails (“thank you for your purchase”) play a significant role in the post-purchase experience; they can increase future transactions by 40%. Use sequence emails to thank customers for their order, provide order confirmations, inform them when their order has been shipped, and politely request reviews. Including sales receipts in emails increases click-through rates by 55%. Additionally, address abandoned carts during the buying stage by sending reminders and including the product name in the subject line. Shipping confirmation emails are an opportunity to suggest cross-selling products and complementary items. Requesting a customer review validates the customer’s decision and bolsters their confidence in their purchase.

The post-purchase experience represents the ongoing relationship you have with your customers. It begins immediately after they buy from you. Whether it’s an immediate interaction, a note sent three days later, or an email confirming their order, you must ensure a smooth transition from purchase to product delivery. For online purchases, promptly send an email acknowledging their payment. Ensure timely and secure shipping of their product to maintain their satisfaction and trust.

By focusing on deepening the client relationship, fostering loyalty, and providing exceptional experiences, you can increase sales and keep customers coming back.

### Key Takeaways

- The cost of acquiring a new customer is higher than retaining an existing one; investing in customer relationships after a sale leads to lower client acquisition costs.
- Enriched customer profiles are crucial for better service and empowering your marketing team.
- Personalizing the buying experience makes it seamless for customers. Engage customers post-purchase with personalized experiences and sustainable packaging.



