2024

RECERTIFICATION

ABSTRACT BOOKLET

AMERICAN GEM SOCIETY®

Consumer Protection Since 1934®

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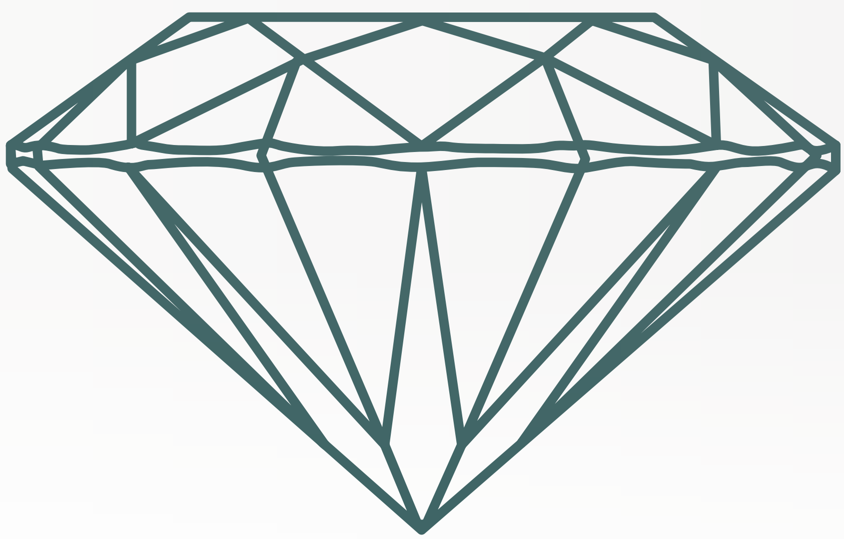

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CLIENTELING, OUTREACH, AND BUILDING PERSONAL TRADE

James (Jimmy) DeGroot, Train Retail LLC and The Jewelry Store Training Institute

One of the biggest desires of a jewelry store owner is to get their staff to build the business the way they did when first starting out. This involves creating relationships and being relevant in people's lives so that your store becomes the "go-to" destination for all things jewelry.

Having staff members reach out to customers regularly is the perfect way to do this for several reasons. It replicates the way the business was built, one customer at a time. It creates scalability for owners by having staff involved in business building and entrepreneurial activities. It engages customers personally so that you become relevant to them and thus creates lifelong fans. Finally, it's the most affordable and effective advertising your business can do.

Step 1

Implementing a good clienteling plan requires a "burn the ships" mentality, meaning: This is how we do business from now on. Everyone is involved, and it becomes one of our business non-negotiables or standards. This will not work if it is approached half-heartedly.

Step 2

Someone must be assigned as the clienteling lead person. This can be the manager, but it doesn't need to be. This person must focus on daily activities by allowing the team to tell success stories in the morning huddle, setting goals for everyone, tracking activity, giving incentives for individuals and the team, creating lists and reports for the team to work with, and scheduling people off the floor to do outreach if needed.

Step 3

Be sure your store is physically set up for quality outreach. The proper tools should be used, and do *not* allow staff to use their own private accounts for outreach. This is a major security risk for them personally. They can use their own devices, but with the store's system account only.

Step 4

Determine your type of outreach per your particular campaign. Texting is far and above the most popular and best received by your clients. It is immediate and has the highest effectiveness in getting a response. Mass texts are good for announcements or store information. Service texts or phone calls are great for repairs, special orders, customer follow-up, and care and warranty communication.

The most effective of all is individual outreach to one customer about something relevant to them. For example: *"Sharon, we just got an amazing seafoam green tourmaline, and I know you love them. Do you want to see it? I'll have it in the safe for you."* Whether this is a text, email, phone call, or Messenger outreach, individual texts create the most sales, the highest ticket sales, and you become more and more relevant to the customer. The clienteling lead should promote 90% individual outreach to 10% mass outreach.

Step 5

It's important to know that mass texts are not an outreach or clienteling activity. Those fall under advertising. For individual outreach to be the most effective, they should be singular, sincere, and personal. To make it easy, use their name (Personal), call out something relevant they said when last in the store (Sincere), and only send out one message at a time (Singular). The best ones happen to be "Thought of you," "We got this in," "We're going to the show and…" and "I'm so excited about this trunk show because they have an incredible new line to complement your blue collection." Think of the way friends communicate but keep it professional. This is how we should be doing outreach.

Step 6

Find slivers of time. Retail can be chaotic, and it's almost impossible to find or schedule time. So, have your plan ready at the beginning of the day. If your goal for the day is five good outreaches, then have your work area ready so that when you find five slivers of time between customers, you can quickly get them done. Some stores schedule people off the floor for one hour per week to do outreach.

Step 7

Tell stories. Your team should be sharing their outreach successes in your morning huddles or at least while you're setting up. The more people hear how effective it is, the more likely they are to make a commitment to regular, daily outreach.

Step 8

Celebrate! We love to be rewarded for our behavior. When you celebrate it, it grows. Buy lunch, give movie tickets, dinner for two, and get creative in your incentives. But over and above incentives, celebrations grow the workplace culture, and you should celebrate good things often.

Many stores talk about outreach and are lulled into believing that sending mass texts, advertising, and service calls are clienteling, but the outreaches that are singular, sincere, and personal are true clienteling and will reap the most and biggest rewards.

Key Takeaways

1. Clienteling builds relationships: By reaching out to customers regularly and personally, businesses can create lifelong fans and become the "go-to" destination for their needs.
2. Implementation is key: Implementing a successful clienteling plan requires commitment from the entire team, with clear leadership, designated responsibilities, and a dedicated focus on daily outreach activities.
3. Personalized outreach is essential: Individual, sincere, and personal outreach to customers yields the most significant results in terms of sales, customer engagement, and building long-term relationships.
4. Utilize Proper Tools: Ensure that your store is equipped with the right tools for quality outreach. Staff should use store accounts for outreach to maintain security and consistency.

MEN'S WEDDING RINGS AS A MAJOR PROFIT CENTER

Eric Laker, Lashbrook

In our efforts to enhance customer satisfaction and increase profitability for retailers in the men's wedding band market, we have discovered several key insights that are surprisingly counterintuitive. We've made our discoveries through investment in technology, large market studies, and significant data analysis. We believe that what we've learned may be as valuable in other categories of fine jewelry as it is in the men's segment.

Our findings play out as retailers shift to a "Custom First" approach. This is simple and mostly requires that inventory items be treated more as sales/customization tools than as pieces to be turned. Some things we learned include:

1. In the U.S. men's band market alone, we are selling over $1.5 billion less than we should be. The average men's band purchase in 2022 was $537. When a "Custom First" approach is implemented, that average can more than triple. Retailers with high average tickets in this category, who do not emphasize custom, will find that they are often selling fewer men's bands than engagement rings.

2. The single biggest opportunity for increasing a retailer's bottom line lies in maximizing the profit in each customer interaction. Coincidentally, when this is done properly, the retailer also optimizes the customer's experience, thereby ensuring repeat and referral business.

3. Customers rarely know what they want, and their initial budget is usually far below what they are truly willing to spend. When customers tell you what they are looking for, they are really expressing their expectations. These expectations are built on experience that has little or nothing to do with actual possibilities or legitimate limitations.

4. "Bestsellers" often oversimplify a category and diminish the customer's experience while reducing retailer profit. Most bestsellers are sold to people who would have been happier to spend more on something they felt more of a connection with.

5. In the best custom experiences, the client drives the process. They become responsible for building value. The customer who is given responsibility for building value will spend far more than if the salesperson is the one doing it. Until the perceived value, in the customer's mind, exceeds the price being charged, they will not buy. As this happens, all preconceived limitations fade away, and only real limiting factors remain in play.

6. Products displayed by the retailer, whether live or as samples, should feature a median price point that is above the target average ticket for the category. Because most sales are below the average price, merchandisers tend to show more pieces at lower price points. The product represented in the retailer's case will set customer expectations. When customers see a lot of inexpensive pieces, they come to believe that most people are happy with them. Also, they find themselves in the position of having to justify a price that is higher. It is evident that non-customizable pieces should not be priced below the category's targeted average ticket price.

In conclusion, while we should feel a sense of accomplishment each time we close a sale, it would also be productive to question what each customer might have designed, purchased, and experienced if we had done things differently. The more we optimize customer engagement and maximize profitability, the stronger we will be for our customers in the future.

Key Takeaways

1. The men’s band market is currently underperforming, with retailers selling over $1.5 billion less than they should be. By implementing a “Custom First” approach, the average purchase can more than triple, leading to higher profitability.
2. Maximizing profit in each customer interaction is the biggest opportunity for increasing a retailer’s bottom line. When done properly, this also enhances the customer’s experience and ensures repeat and referral business.
3. Bestselling items in the men’s band category can devalue the customer experience and reduce retailer profits. Many customers would have been happier to spend more on a ring that resonates with them emotionally.
4. Customers who are currently buying at the low end of the category have the potential to buy higher-priced items if handled differently. By empowering the customer to build value and eliminating preconceived limitations, they are more likely to invest in higher-end offerings.

Thank you to Jewelers Mutual® for graciously providing the following for inclusion in the American Gem Society's Annual Recertification Exam

SPOT THE RISK: PROTECT YOUR BUSINESS AGAINST CRIME

JEWELERS MUTUAL® GROUP

From physical theft to cyber-attacks, jewelry retailers remain vulnerable in a sea of potential threats to their businesses. Staying vigilant and implementing safety best practices is more crucial now than ever to protect your store, employees, and customers 365 days a year.

It is important to consider store security from all angles and learn from your fellow jewelers to help improve security throughout the jewelry industry. Keep security "top of mind" in all interactions with customers and encourage security-related continuing education with staff.

Here, we will review best practices for store security and loss prevention. Those examples will be paired with expert recommendations for preventing losses in a retail setting.

External Store Protection: Missing exterior protection can be devastating for your store. Controlled access (locked door buzzer, dual secure door entry, chime), glazing on exterior windows, improved lighting, bollards for vehicle intrusion, and standard protocol and signage for the removal of hats, sunglasses, masks, etc. are all key safety measures that improve the safety of your store and everything inside it.

Camera Placement: Proper interior and exterior camera placement can be the difference between apprehending a criminal and not. We recommend eye-level cameras at all entry points and in more unusual places like door frames. Remain vigilant when large, loud groups come in with elaborate stories, never allow the customer to gift-wrap any items, and use a code word with your staff when any suspicious activity occurs. To make sure you can review any suspicious activity as needed, always back up all camera footage off-site for at least 30 days.

Physical Protection: Your last line of defense should criminal activity make its way into your store. Professionally installed glazing (14 mil thickness) on showcases, sensors for glass break and water, and low-temperature sensors can all help mitigate loss.

Safes and Vaults: As burglaries remain the top form of crime committed against jewelers, safe type and placement are more important than ever. A safe with six-sided protection (or Class I vault) is the best option for most.

To prevent a safe attack, ensure your safe placement is away from shared/adjoining walls. Have both a primary (internet) and secondary (adaptive cellular) method of alarm transmission to a central monitoring facility, four-step motion detection, Electronic Vibration Detection on safe, door and window contacts, rooftop cameras with remote monitoring supporting verified response and respond to every single alarm condition.

Procedural Practices: Smash-and-grab and other jeweler-targeted crimes continue to rise in frequency and severity. To help mitigate risk and prevent loss, implement supervised openings/closings, a locked door buzzer system, exterior cameras to verify customer entry, double door entry, and jamb cams. Always store merchandise out of sight and secure in a safe overnight.

Key Takeaways

1. Store security should be a top priority for jewelry retailers, as they remain vulnerable to physical theft and cyberattacks.
2. Implementing safety best practices, such as controlled access, improved lighting, and glazing on exterior windows, can improve store safety.
3. Proper camera placement, both inside and outside the store, is essential for apprehending criminals. Eye-level cameras at entry points and unusual places like door jambs are recommended.
4. Physical protection measures, such as professionally installed glazing on showcases and sensors for glass break, can help mitigate loss if criminal activity occurs.
5. Safes and vaults play a crucial role in protecting valuable merchandise. A safe with six-sided protection (or Class I vault) is the best option for most jewelers. Safe placement away from shared/adjoining walls, the use of alarm transmission methods, and motion detection are also important.

WHY CARING LEADERSHIP™ IS YOUR BIGGEST DIFFERENTIATOR IN 2024

Heather R. Younger, Employee Fanatix

When I was on a college visit with my son in New York, we had to navigate through Penn Station, hopping on and off different trains. We stumbled upon one train but weren't sure if it was the right one. As it left, a kind lady directed us to a faster option. As we climbed the stairs, I questioned whether we were on the correct train. As my son and I were staring at the screen, a kind gentleman approached us and asked if we needed help finding something special. I initially assumed it was a sales pitch in busy New York, but I was pleasantly surprised when he suggested which train to take. It was heartwarming to see two strangers lending a helping hand, shattering stereotypes, and showing the true welcoming spirit of the city.

In a moment of true leadership, I experienced care and compassion without any management or official title. It was a simple act of kindness that made a big impact on me and my son. Imagine the positive impact we can have on our customers, children, and colleagues if we just take notice of their needs, actively listen, and offer help when they need it most.

Being a leader in the jewelry industry is not an easy task, especially when dealing with the busyness inside of your store. With the numerous responsibilities and pressures that come with it, finding a balance between being effective and empathetic can be a daunting task. However, when we talk about exceptional leaders, it is not their technical skills or wealth of knowledge that sets them apart, but their unique ability to genuinely care and inspire those around them.

Caring Leaders Build Strong Connections

To be a caring leader means understanding the importance of relationships, not just results. An article from Forbes says, "Compassionate Leadership is the practice of using your head and heart to inspire and influence people so they can, in turn, inspire and influence others." Leaders that show genuine empathy and kindness towards their employees and customers tend to have stronger relationships that foster mutual trust and respect. When employees and customers experience this, they become more loyal and dedicated to the company. Moreover, having a secure and safe working environment means employees will be more willing to take risks by sharing ideas and helping colleagues achieve mutual goals.

Who is the next person you will invite to share their opinion on a change or open initiative in your store(s)?

It Encourages Creativity and Innovation

'When employees and customers know that they are being heard and valued, they become empowered to present ideas and provide feedback. Caring leaders not only listen empathetically, but they also foster creativity and innovation. In a safe and comfortable environment, employees and customers will not be afraid to share their vision. More so, if leadership is open-minded and receptive. When disruptive ideas are implemented, they can transform the way an organization creates value.

In what ways will you foster this type of innovation in your store(s)? How will you foster a sense of feeling safe to speak up with your employees and customers?

It Improves Employee Engagement and Retention

One of the most effective ways of preventing employee turnover is by promoting a strong workplace culture. Without strong leadership, employees can feel uninspired, causing them to leave the organization. Caring and supportive leadership tends to create an environment where employees feel like an integral part of a team, which will boost their commitment and passion toward their duties.

Write a plan that lays out the ways you will include your employees and customers in idea-generation to create positive business results for your store(s).

Caring Leadership Promotes Personal Growth Amongst Employees

An effective leader not only cares about their staff, but they understand the need for individual growth. Caring leaders identify the strengths and challenges of their employees, creating opportunities for personal and professional growth. They provide feedback, mentorship, and guidance, not just to advance work performance but also to support their staff's aspirations.

Which of your employees could use mentorship? What will you do to offer that to them?

Reflection

In summary, preferring to be a caring leader means understanding the benefits of building strong, productive, and innovative teams. In today's workplaces, with people from diverse backgrounds and values working for and coming into your stores, Caring Leadership continues to be more relevant and meaningful. By prioritizing empathy and kindness, jewelry store leaders can create a more dynamic company culture that fosters success for all.

Remember, as a leader, empathy and kindness can be your most potent tools for both employee and customer retention—use them wisely, and they will always come back with great results. I know my experience in that New York subway reinforced that for me.

Key Takeaways

1. Genuine empathy and kindness towards employees and customers can lead to stronger relationships based on trust and respect. This, in turn, fosters loyalty and dedication, creating a positive environment for collaboration and mutual success.

2. When employees and customers feel heard and valued, they are empowered to share ideas and feedback. Caring leaders create a safe space for creativity and innovation to flourish, leading to the transformation of the organization's value-creation process.

3. Strong workplace culture and supportive leadership play a vital role in preventing employee turnover. Caring leaders make employees feel integral to the team, boosting their commitment and passion for their work.

4. Effective leaders not only care about their staff but also support their personal and professional growth. By offering mentorship, feedback, and guidance, caring leaders help employees develop their skills and achieve their aspirations, contributing to overall team success.

EXPLORING THE GEMSTONE TREASURES OF VIETNAM'S LUC YEN REGION

David Nassi, CG, 100% Natural Ltd.

Although somewhat of a new producer of marketable gemstones compared to other major mining areas, Vietnam has produced an abundance of gems for over 30 years. Gem-quality corundum (ruby and sapphire), spinel, beryl (aquamarine), garnet, tourmaline, topaz, opal, pearl, jadeite, and zircon are just some that occur throughout the country. With the discovery of ruby in the northern district of Luc Yen in 1987, this area quickly became an important commercial source of gems in the global market. Shortly thereafter, the Luc Yen gem market was established—the most important of its kind in Northern Vietnam.

Rubies from Luc Yen can share qualities with the best material from Burma, including high fluorescence and vivid red saturation. Large, untreated top-quality gems, however, are arguably rarer, as fine-quality stones over five carats are rarely seen, and most of the material is too included to be used in jewelry.

Another important gem variety, cobalt blue spinel, has been notably sourced from Luc Yen since the early 2000s. This variety of spinel is often considered the rarest and most desirable amongst collectors, and the stones from Luc Yen are debatably the most beautiful. With its vivid blue hue and near-glowing appearance, most of the material is too small for jewelry use and is instead crushed for use in the locally produced gemstone paintings, as are many of the gemstones found in the area.

The gems occur in both primary and secondary deposits in this region. The primary deposits are typically marble host rocks, while the secondary deposits are typically found in gravel beds and along waterways. When not tending to agricultural activities and when the weather allows, farmers most often mine in small artisanal mines.

Since the late 1980s, the area of Luc Yen has dramatically changed, with most of the development occurring within the last 10 to 15 years. As access and infrastructure improve in the area, Luc Yen is certain to play an important role in supplying fine-quality gems on the world stage.

Key Takeaways

- Vietnam has been producing an abundance of gem-quality gemstones for over 30 years, including corundum (ruby and sapphire), spinel, beryl (aquamarine), garnet, tourmaline, topaz, opal, pearl, jadeite, and zircon.
- The district of Luc Yen in Vietnam became an important commercial source of gemstones in the global market, particularly for rubies with qualities comparable to the best material from Burma.
- Luc Yen has been a notable source of cobalt blue spinel since the early 2000s. This variety of spinel is considered rare and desirable, with stones from Luc Yen being debatably the most beautiful
- The area of Luc Yen has undergone significant development since the late 1980s, with improvements in access and infrastructure. As a result, Luc Yen is expected to play an important role in supplying fine-quality gems on the global stage.

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Thank you to GIA for graciously providing the following for inclusion in the American Gem Society's Annual Recertification Exam

THE NATURAL DIAMOND STORY

Dr. James Shigley, Brenda Harwick, and John Cason, GIA

The marketing slogan, "A Diamond is Forever," adopted more than 70 years ago by De Beers, continues to reflect both the ancient geological origin and enduring permanence of diamonds. Although not often thought of in these terms, diamond is likely the most widely recognized mineral. It is also one of the most chemically pure materials which, because of its composition and atomic structure, exhibits a range of exceptional physical properties.

Natural diamonds are among the most ancient minerals, having formed up to 3.6 billion years ago in the lower crust as well as much deeper in the upper mantle based on recent discoveries by GIA (Gemological Institute of America) and other geoscientists. After an extended residence time deep in the earth, diamonds were rapidly brought to the surface by explosive eruptions of kimberlite or lamproite magmas (these events have never been witnessed, with the most recent eruption now thought to have occurred about 20 million years ago).

Diamond recovery takes place at primary (kimberlite) and secondary (alluvial) deposits in a few countries. Kimberlite pipe mining is carried out by major companies, whereas alluvial deposits along rivers are often the focus of more small-scale artisanal mining activities. With a typical mine lifetime of about 30 years, almost all current mine locations will likely cease operations within the next two or three decades, and hopefully, new accessible kimberlite pipes will be discovered in the near future. Once a pipe mine closes, a multi-year effort is normally required to first remove all surface and underground infrastructure and restore the land, and then to continue to monitor and protect the environment. The low diamond content of most pipes (rarely up to one carat per tonne of ore) results in the need to process a huge volume of kimberlite rock. Such mining activity takes place in open surface pits and associated underground workings. Alluvial deposits occur along river channels, and in southwestern Africa on the offshore shallow coastal shelf and along the beaches.

In contrast to colored stones such as ruby and sapphire, there are no features in a polished gem diamond that provide an indication of its geographic origin. The only laboratory origin service provided by GIA is the program to match the internal features of a rough diamond from a known mine to a polished stone created from that rough.

Major mining companies recover and market about 85% of diamonds by volume and 95% by value. Mining from a kimberlite pipe is a well-planned and funded, large-volume rock-moving and processing operation that occurs over a relatively limited land area. The goals are to maximize diamond recovery while minimizing mining costs and reducing waste.

Employee safety and environmental protection are priorities. Given that pipe locations often occur in remote geographic locations, all needed mining infrastructure must be constructed, supplied, and maintained. Large mining companies provide high-paying jobs and employment opportunities for area residents as well as significant financial contributions and other education, medical, and other assistance to local communities. These companies currently support the livelihood of some 10 million people.

As mentioned above, an eventual mine closure involves extensive efforts to restore the location as much as possible to its state before the mining started. Mining operations from start to finish are subject to governmental permitting, regulation, and unannounced inspections.

Artisanal mining of secondary diamond deposits takes place on a much smaller scale with a less organized social structure. Although artisanal miners only account for about 15% of the world diamond supply, this activity employs an estimated 41 million people mainly in Africa. Individuals or small groups of miners, using simple tools, dig up sediments from shallow pits in areas along rivers to search for diamonds. This activity normally produces relatively limited land surface damage but it does create deforestation and some water pollution. Once an area is no longer productive, these miners move elsewhere.

Mining generally involves washing diamond-bearing sediments near sources of water—there is no use of explosives or mercury, cyanide, or other chemicals (such as in alluvial gold mining) that would damage the environment. These mining activities, in many cses with little governmental control or local official supervision, bring normal societal challenges and the possibility of child labor, human rights abuses, and corruption.

Often with less education and little understanding of the gem trade, artisanal miners can also be victimized by individuals who show up to buy the gems produced by their labors but may not always offer a fair price. In spite of this, artisanal gem mining is an important activity in many parts of the world where thousands of individuals are seeking to economically support themselves and their families. Several companies and jewelry industry initiatives currently focus on empowering and supporting artisanal miner communities, which often include the important role of women.

Rough diamonds from both primary and secondary sources enter the well-established manufacturing and marketing “pipeline” that involves the efforts of tens of thousands of individuals. Today, most diamond polishing occurs in India and, depending on the diamond material, to a lesser extent elsewhere. Polished gems then pass through major diamond trading centers. Mining companies, manufacturers, and major retailers all create advertising to elicit and drive consumer interest in gem and jewelry purchases.

Despite being used more extensively over the past century, diamonds remain an incredibly rare but nonetheless available product from nature with an unmatched geological history. Human ingenuity and labor transform diamonds into unique gemstones symbolic of so many human emotions and desirable qualities.

Key Takeaways

- Natural diamonds are among the most ancient minerals, having formed up to 3.6 billion years ago in the lower crust as well as much deeper in the upper mantle.
- The typical diamond mine life is about 30 years, which means that almost all current mine locations will likely cease operations within the next two or three decades.
- The only laboratory origin service provided by GIA is the program to match the internal features of a rough diamond from a known mine to a polished stone created from that rough.
- Artisanal mining of secondary diamond deposits employs an estimated 41 million people, mainly in Africa.

CONNECTING WITH THE CRAFTY COLLECTOR: HOW RETAILERS CAN PREPARE FOR TODAY'S WATCH SAVANTS

Barbara Palumbo, What's on Her Wrist

For years, diamond buyers have searched the internet, joined diamond forums, researched, read, and deemed themselves experts. The "Watch Savant" community (as they call themselves) is strong and savvy and can turn an Authorized Dealer's world upside down if given the opportunity.

There is no shortage of information available on the internet in the form of watch news publications, watch blogs, vlogs, YouTube channels, podcasts, Instagram pages, and even TikTok channels. There is also no shortage of traditional print presses available. Buyers and enthusiasts can educate themselves about modern or vintage timepieces. These topics were discussed at AGS Conclave in Austin, TX, by panelists Kathleen McGivney and Eric Wind, with Eric and Kathleen giving the audience names of publications and forums they could share with their staff.

Recommended Print Publications:

Revolution Magazine

WatchTime Magazine

Europa Star

Watchonista

Haute Time

Hodinkee

Recommended Online Publications:

Fratello Watches

Monochrome

A Blog to Watch

Worn & Wound

Gear Patrol

Recommended Podcasts:

Scottish Watches

Hodinkee Radio

Bark & Jack

A simple hashtag search on Instagram using terms such as "watchcollectors," "watchnerds," "timepieces," and/or "vintagewatches" will pull up a plethora of watch-related Instagram pages, which could send the user down a rabbit hole of information. Of course, this is largely how the Watch Savants community learns what they do, so it's good to be one step ahead of them by seeing what they will eventually see.

Connecting with Collectors

Kathleen, who is the CEO of RedBar Group—the largest watch-collector group in the world—encouraged retailers to reach out to collector groups in their area, whether they were RedBar groups or not. RedBar has several large chapters in most major cities in the United States and Canada, and will often partner with watch retailers for events, bringing enthusiasts into the stores they might not normally visit. Events can vary, cost-wise, depending on whether the retailer can also collaborate with a brand they carry. It was mentioned that RedBar is not the only enthusiast group that exists in the watch community and that retailers should do a quick Google search to see if there are others in their area.

Watches are becoming increasingly popular amongst women and the LGBTQIA+ community, and brands have caught on to this fact. Women enthusiasts are starting their own watch-collecting clubs, and some have launched their own watch podcasts, which is a far cry from even ten years ago.

Eric emphasized that education for the entire staff was imperative when it comes to working with Watch Savants and that the wrong salesperson could turn away a potentially lifelong client if they don't understand the inner workings of a watch or even basic terminology.

Key Takeaways

1. Retailers should stay informed about watch-related publications, both online and print, to better engage with knowledgeable customers. Such print publications include *Revolution Magazine*, *WatchTime Magazine*, *Europa Star*, and online publications like *Fratello Watches*, *Monochrome, A Blog to Watch.*

2. Building relationships with local watch-collecting groups can bring new clientele into stores through events and collaborations.

3. Educating the entire sales staff on watch terminology and mechanics is crucial to avoid losing potential lifelong customers.

4. Women and the LGBTQIA+ community are increasingly showing interest in watches, prompting brands to cater to a more diverse audience. Retailers are encouraged to educate their staff on watch knowledge and terminology to ensure they can effectively engage with this expanding demographic of watch enthusiasts.

DIVERSE DIALOGUES: MULTI-DEMOGRAPHIC MARKETING IN THE JEWELRY WORLD

LARYSSA WIRSTIUK, JOY JOYA

The global jewelry market is evolving at a rapid pace, revealing the critical importance of embracing diversity in marketing strategies. Jewelry brands must tailor their approaches to meet the nuanced preferences and needs of a diverse audience. By delving into strategic segmentation, personalized storytelling, and platform-specific content creation, you can foster an inclusive marketing environment that effectively resonates with a broad spectrum of consumers.

Strategic Audience Segmentation

The foundation of effective multi-demographic marketing is strategic audience segmentation. Understanding that a one-size-fits-all approach is no longer viable, marketers must identify and comprehend the distinct segments within their broader audience. This involves using demographic, psychographic, and behavioral data to inform targeted marketing strategies. By doing so, marketers can craft messages that cater to specific interests, preferences, and needs, thereby increasing relevance and resonance.

Segmentation allows brands to:

- **Identify Unique Characteristics**: Recognize the unique traits and behaviors of different demographic groups.
- **Create Targeted Messages**: Develop marketing content that speaks directly to the specific interests of each segment.
- **Enhance Customer Engagement**: Improve the likelihood of engagement and conversion by addressing the particular needs of each audience group.

Universal and Personalized Narratives

Balancing the creation of universal messages with personalized narratives is crucial in connecting with a diverse consumer base. While universal messages aim to appeal to a broad audience, personalized storytelling allows brands to speak directly to individual segments. This dual approach helps bridge the gap between a brand and its diverse consumers, fostering a deeper emotional connection.

Brands can achieve this by:

- **Developing Core Brand Stories**: Crafting overarching narratives that encapsulate the brand's values and mission.
- **Personalizing Content**: Tailoring stories and marketing materials to reflect the specific experiences and aspirations of different demographic groups.
- **Utilizing Diverse Voices**: Incorporating real stories from various backgrounds to ensure authenticity and relatability.

Effective Use of Platforms

Different demographics engage with various platforms uniquely. Understanding these preferences is essential for maximizing the impact of marketing efforts. Data analytics and consumer behavior insights can guide brands in tailoring their approach on each social media and digital platform, ensuring that marketing efforts are both widespread and strategically targeted.

To optimize platform usage, brands should:

- **Analyze Engagement Metrics**: Monitor and analyze data to understand which platforms are most effective for different demographic groups.
- **Customize Content**: Create platform-specific content that resonates with the audience on each channel.
- **Leverage Influencers**: Partner with influencers who can authentically connect with diverse segments.

Accessibility and Inclusivity in Marketing

Ensuring that marketing content is accessible and inclusive is not only ethical but also expands a brand's reach. ADA compliance, user-friendly website design, and inclusive content are vital for making marketing accessible to all demographics. This reinforces a brand's commitment to valuing and respecting all potential customers.

Steps to enhance accessibility and inclusivity include:

- **Adopting Inclusive Design Principles**: Designing marketing materials that are accessible to people with disabilities.
- **Creating Multilingual Content**: Offering content in multiple languages to cater to a global audience.
- **Promoting Cultural Sensitivity**: Being mindful of cultural nuances and avoiding stereotypes in marketing.

Authentic Engagement with Diversity

Genuine diversity in marketing goes beyond tokenism. It involves showcasing real stories from diverse groups and ensuring that marketing campaigns reflect society's varied tapestry. This approach helps brands avoid superficial representations and fosters genuine connections with consumers.

Brands can foster authentic diversity by:

- **Highlighting Real Stories**: Featuring diverse voices and experiences in marketing campaigns.
- **Celebrating Multicultural Events**: Acknowledging and celebrating multicultural holidays and observances.
- **Aligning with Diverse Events**: Sponsoring and participating in events that resonate with different demographic groups.

By embracing and understanding the multifaceted nature of their audience, jewelry brands can craft more meaningful, engaging, and effective marketing campaigns that truly resonate with their diverse consumer base.

Key Takeaways

1. Understanding distinct segments within the broader audience through demographic, psychographic, and behavioral data is crucial for crafting targeted messages that resonate with specific interests, preferences, and needs.
2. Balancing universal messages with personalized storytelling helps connect with a diverse consumer base by creating emotional connections through overarching brand stories and tailored content reflecting different experiences and aspirations.
3. Tailoring marketing strategies to different social media and digital platforms based on audience engagement metrics, customized content, and leveraging influencers to connect with diverse segments authentically enhances the impact of marketing efforts.
4. Making marketing content accessible and inclusive through ADA compliance, user-friendly design, multilingual content, and cultural sensitivity not only expands a brand's reach but also reinforces a commitment to valuing and respecting all potential customers.
5. Moving beyond tokenism and showcasing real stories from diverse groups while celebrating multicultural events and aligning with diverse activities fosters genuine connections with consumers, leading to more meaningful and engaging marketing campaigns.

EMBRACE THE POWER OF AI: MASTERING CHATGPT PROMPTS

Donna Jolly, RJ, American Gem Society

In an era of rapid technological advancements, it's important to leverage the power of AI and master ChatGPT prompts to unlock the full potential of this innovative tool. ChatGPT and other AI chat tools, such as Bard and Bing, are revolutionizing how we do business by generating creative ideas, providing practical solutions, and offering valuable insights.

Crafting detailed and concise prompts is the key to harnessing the full potential of ChatGPT. Here are 10 curated and tested prompts designed for AGS members. By utilizing these prompts effectively, you can elevate your business and stay ahead of the curve.

Editing Copy

Please review this copy for our [*type of content here, e.g., newsletter, ad, email message*]. Ensure that there are no typos, grammar errors, or awkward phrasing. Make the text compelling and accurate. Focus on clarity and readability:

- Copy and paste the content for review after the prompt. End the prompt with a colon, as shown above. The colon helps AI understand where the prompt ends and the copy for review begins.

Follow-Up Email

Compose a personalized and engaging follow-up email to thank clients for visiting us and offer them [*insert promotion details, such as a 10% discount or value-added service, plus the time frame*]. The tone should be warm, friendly, and professional, yet concise. Please limit this email to no more than 50 words. Aim to include a clear call to action and specify the email's purpose, such as requesting feedback or promoting upcoming events.

Social Media Post

Create an engaging social media post that captures the beauty of [*insert item, such as "halo engagement ring featuring a two-carat round-brilliant diamond center"*]. Encourage followers to visit our business to view this exquisite piece in person or explore our website for more details. Highlight the intricate design and superior craftsmanship that make this ring genuinely extraordinary. Don't forget to include a clear call to action, urging followers to schedule an appointment or browse our collection today.

- Tailor this to specific jewelry pieces, such as emerald stud earrings, a strand of pearls, or a particular brand's watch. Include details like carat weight, setting, metals, gemstone type, and even price if you prefer.

Salesperson Script

Provide a sales script for our team to greet clients and initiate conversations. The script should include a warm welcome, questions to understand their jewelry preferences, and recommendations for suitable pieces based on their responses.

- Tailor the prompt by specifying various types of jewelry and specific brands you want to promote. Ensure the response from the chat tool is accurate.

Onboarding New Salesperson

Generate an onboarding guide for new salespeople. Include information about our business's history, values, and client-centric approach. Outline the sales process, training resources, and mentorship opportunities available to new team members.

- At this point, you might add a colon and then copy/paste or write content relevant to this, such as copying and pasting information from the “About Us” section of your company website or any onboarding documentation you have.

Marketing Campaign

Create a marketing campaign to promote our business’s [insert the number of years] anniversary. Develop a concept highlighting our company’s heritage, showcasing special anniversary collections, and entices clients with exclusive offers or events. Our target audience is [*insert your target audience*].

- If you have a specific promotion in mind, include that in this prompt. Also, include budget constraints and limitations.

Client Engagement

Suggest innovative ways to engage our clients and build long-lasting relationships. Provide ideas for loyalty programs, personalized services, or interactive experiences that enhance their connection with our business and brand.

- Include examples of the personalized services or loyalty programs your business already offers. This will help the AI suggest innovative ideas that complement your existing strategies.

Visual Merchandising

Offer guidance on refreshing our business visual merchandising. Propose ideas to create eye-catching displays, incorporate storytelling elements, and highlight specific jewelry pieces or themes that captivate clients and drive sales.

Online Presence Enhancement

Provide recommendations for enhancing our online presence. Share strategies to improve our website’s user experience, optimize product descriptions for better search visibility, and leverage social media platforms to reach and engage our target audience.

- Some AI tools will be better at this than others. Play around with Gemini and ChatGPT to get ideas from all three.

Community Involvement

Suggest ways for our business to actively participate in the [*insert local community*]. Identify local events, sponsorships, or partnerships that align with our brand values. Propose ideas to showcase our commitment to social responsibility and establish ourselves as trusted community members.

When crafting your prompts, be specific and avoid spelling errors that can confuse the AI. While ChatGPT has incredible learning capabilities, it may miss nuanced details or produce messaging that doesn’t align with your brand.

It’s important to review the AI-generated results and make any necessary changes to ensure accuracy and maintain your brand voice. Remember, like humans, ChatGPT is constantly learning but with a faster ability.

In addition, it is crucial to exercise caution and refrain from including confidential or sensitive information in your AI prompts. While AI tools are designed to assist and generate content, they may not have the ability to ensure the security and privacy of confidential data. Avoid including proprietary information or other sensitive details that could compromise your business’s reputation or compliance with applicable laws and/or regulations.

Embracing the power of AI and mastering prompts can save you time and unlock new possibilities for your business.

Key Takeaways

1. Detailed and concise prompts are essential to harnessing the full potential of ChatGPT and other AI chat tools. Specific prompts help generate more accurate and useful responses, which can elevate business operations and keep the company ahead of the curve.
2. ChatGPT and similar AI tools can be used for a variety of business needs, including editing copy, composing follow-up emails, creating social media posts, developing salesperson scripts, onboarding new employees, designing marketing campaigns, enhancing online presence, and engaging with the community.
3. While AI-generated content can be incredibly helpful, it is crucial to review and customize the results to ensure accuracy, maintain the brand voice, and avoid any potential security or privacy issues. Businesses should exercise caution and refrain from including confidential or sensitive information in AI prompts.

THE ART OF RETAINING CUSTOMERS FOR YOUR JEWELRY BUSINESS

Laryssa Wirstiuk, Joy Joya

In today's fiercely competitive jewelry market, where consumer expectations constantly evolve, focusing on customer retention has never been more crucial. Jewelry businesses should focus not only on building but also on maintaining long-term customer relationships. Jewelry businesses can transform one-time purchasers into lifelong brand advocates by exploring innovative engagement methods, personalized communication strategies, and loyalty programs.

The Economic Advantages of Customer Retention

One of the core arguments for focusing on customer retention is its economic efficiency. Research reveals that acquiring a new customer is significantly more expensive than retaining an existing one. From 2013 to 2022, the cost of acquiring a new customer skyrocketed by 222%. In contrast, repeat customers tend to spend 67% more than new customers. These statistics underscore the critical importance of retention in ensuring business sustainability and growth.

Benefits of Building a Loyal Customer Base

Beyond the economic rationale, customer loyalty offers several qualitative benefits. Loyal customers serve not only as repeat buyers but also as brand ambassadors who amplify positive word-of-mouth. The lifetime value of retained customers significantly outstrips that of one-time purchasers, contributing to a stable and predictable revenue stream. Additionally, loyal customers often provide valuable feedback and insights, helping brands continuously refine their products and services.

Strategies for Effective Customer Retention

Implementing effective customer retention strategies involves several key approaches:.

- **Strategic Email Marketing**: Leveraging email marketing to foster emotional connections through storytelling. Highlighting the journey and craftsmanship of jewelry pieces can create a deeper emotional bond with customers.
- **Diversifying Content Across Platforms**: Diversifying content across different platforms engages customers with varied interests, ensuring that the brand remains relevant and top-of-mind.
- **Creating a Sense of Community**: Building a community where customers can share their experiences and bond over shared values. This sense of belonging fosters deeper loyalty and engagement.

Personalization and Customer Engagement

Personalizing marketing efforts to meet individual customers' specific needs and preferences is crucial for enhancing satisfaction and loyalty. This can be achieved through:

- **Targeted Communications**: Sending personalized messages and offers based on customer behavior and preferences.
- **Celebrating Milestones**: Acknowledging customer milestones, such as birthdays and anniversaries, with special promotions or messages.

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- **Tailoring Promotions**: Customizing promotions to align with individual customer interests and purchasing habits.

Innovative Loyalty and Referral Programs

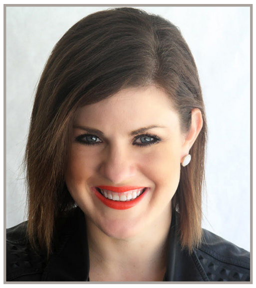
Designing and implementing loyalty programs can incentivize repeat purchases, referrals, and social media engagement. Effective loyalty programs offer exclusive rewards, early access to new collections, and unique experiences, creating a compelling value proposition for customers to remain engaged and loyal.

Common challenges in implementing retention strategies include balancing the desire for personalization with the need for scalability and integrating customer feedback into continuous improvement processes. By addressing these challenges through practical solutions, jewelry businesses can maximize the impact of their retention efforts.

By focusing on these key areas, jewelry businesses can create meaningful and lasting relationships with their customers, ensuring continued success in an increasingly competitive market.

Key Takeaways

1. Cost-Effectiveness of Customer Retention: Retaining customers is significantly more cost-effective and valuable in the long term than acquiring new customers.
2. Personalized Storytelling and Engagement: Engaging customers through personalized and emotional storytelling highlights the journey and craftsmanship of jewelry pieces, fostering deeper connections.
3. Community and Loyalty Building: Building a sense of community and implementing innovative loyalty programs transform customers into brand advocates, promoting sustained engagement and loyalty.



WHAT'S #TRENDING ON SOCIAL MEDIA IN 2024

Jen Cullen Williams, Jen Cullen Williams Communications

In 2024, social media trends for jewelers are moving towards a more authentic and engaging approach, focusing on building genuine connections with consumers. One prominent trend is the rise of "Raw-thentic" content, emphasizing authenticity and genuineness over polished perfection. Consumers are drawn to brands that showcase their personality and the people behind the scenes, fostering a deeper connection.

Sharing "Behind the Scenes" content has become increasingly popular, providing insight into the creation process, daily operations, and personal experiences. This includes behind-the-curtain glimpses into how products are made, day-in-the-life narratives, and engaging "Get Ready with Me" segments.

The concept of "Edu-tainment" is gaining traction, blending education and entertainment to offer followers useful insights and insider tips in an engaging manner. By providing valuable information in an entertaining format, jewelers can captivate their audience while establishing authority in their niche.

Maintaining an active social presence remains crucial, with continued emphasis on interacting with followers through likes, comments, and responses. This ongoing engagement helps foster a sense of community and strengthens brand loyalty.

Contrary to previous practices, the significance of hashtags on platforms like Instagram (IG) has diminished. While they can still be used, it's advised to limit their usage to less than five, focusing more on the content itself rather than excessive tagging.

Facebook Groups have emerged as valuable tools for building customer communities and fostering deeper connections with audiences. By offering insider tips, exclusive promotions, and a sense of belonging, businesses can cultivate loyal followings within these groups.

Video content continues to dominate platforms such as IG Reels, TikTok, and YouTube, with short-form videos currently leading the way. However, long-form content is gaining momentum, providing opportunities for deeper engagement and storytelling.

Jewelers, particularly brick-and-mortar establishments, are encouraged to incorporate User Generated Content (UGC) into their marketing strategies. Collaborating with real customers to showcase their experiences, from shopping in-store to custom design processes, can enhance authenticity and build trust with potential customers.

Aligning brand content with larger pop culture trends has proven effective, particularly on TikTok and Instagram. By tapping into relevant cultural phenomena, such as celebrity preferences or themed trends, jewelers can capitalize on current interests and attract wider audiences.

Utilizing tools like Pinterest Predicts can provide valuable insights into upcoming trends and themes based on user activity and trend analysis. Leveraging these predictions, businesses can tailor their social media strategies to align with emerging trends and stay ahead of the curve in 2024.

Key Takeaways

1. Jewelers are increasingly adopting a more authentic and engaging approach on social media by focusing on “Raw-thentic” content that emphasizes genuineness and personality over polished perfection. This shift resonates well with consumers who value genuine connections and appreciate behind-the-scenes insights from brands, highlighting the importance of authenticity in building consumer relationships.

2. The concept of “Edu-tainment” blends education with entertainment, offering followers useful insights and insider tips in an engaging manner. This approach helps jewelers captivate their audience and establish authority in their niche.

3. Maintaining an active social media presence and interacting with followers through likes, comments, and responses is crucial. This ongoing engagement fosters a sense of community and strengthens brand loyalty.

4. The significance of hashtags on platforms like Instagram has diminished, while Facebook Groups have emerged as valuable tools for building customer communities and fostering deeper connections with audiences. Businesses can benefit by using hashtags strategically and creating meaningful interactions within Facebook Groups to cultivate loyal followings.

FIRST ENGAGEMENT MATTERS: SOLVING THE "I'M JUST BROWSING" HURDLE

Victor Antonio, Author and Business Consultant

When a customer walks into your store, we all agree that first impressions and first engagement are important.

One retail clothing study showed that asking, "May I help you find something?" increased close rates by 30%. So, engaging the potential buyer matters, but how we engage them matters most.

So, let's say a customer walks into your store and you say, "Can I help you find something?" The customer quickly responds, "No, I'm just browsing."

What should you say or do?

The "No, I'm just browsing" is a push-off statement. A push-off is a statement that tells you that the customer doesn't want to be helped. But is that true?

I would argue that the majority of customers need help. They're just afraid to "commit" to being helped because if they accept your help, they'll feel obligated to buy something. Since no one likes to feel obligated, "No, I'm just looking" sidesteps the "commitment issue."

The key to dealing with this push-off is to lean into it. No matter what the customer says or how they respond, you lean into that push-off with confidence. Let me show you what I mean.

Customer: "I'm just browsing."

You: "Great! We love it when folks come in to browse. People usually browse for one of four things: a special gift for someone, an anniversary (milestone), getting married, or a simple indulgence for themselves (i.e., treat yourself). Which one is it?"

Nine times out of ten, customers will give you an answer. And that is how you kick-start an engaging conversation. By responding this way, you've done four things:

1. Signaling confidence, expertise, or both. Subconsciously, the "Let me know if you need help" response signals that you can't help. You put the customer at ease when you respond with a menu of options. Remember, your energy and tone of voice speak volumes!

2. Giving the customer four options—gift, anniversary, bridal, or treating yourself—demonstrates to the customer that you know why most people come to the store and that they aren't any different. Using four options also makes it easy for them to tell you what they want.

3. Most customers entering your store may feel anxious. They're worried about two things: The right product and affordability. Even if money isn't an issue, buying the right product matters. So, remember, when you get the push-off, "I'm just browsing," use the script above and say it with a smile, a sense of humor, and a touch of lightness to lower their anxiety.

4. Use a touch of humor with the last option, "Or, is it something just for you?" Again, the goal is to add some lightness and/or humor to get customers to feel comfortable.

Here's an alternative script if the one above is "not your style."

You: "Great! We love it when folks come in to browse. Right over here, we have all things wedding. Here we have special anniversaries or special gifts. And right here (let's assume it's a male buyer), may I suggest these items if you're looking for something to give yourself? My name is [your name]. When you see something you like, you just let me know."

Then, after some time, approach the customer again with a friendly and enthusiastic tone and say, "I noticed you're looking at engagement rings. May I ask you a few questions so we can narrow down your search?" Nine times out of ten, they'll say, "Sure."

Customers have difficulty deciding because they're not the experts—you are. They also have a high level of anxiety about making a big purchasing decision. Approach customers with the intent of helping, not selling. Do that, and you'll see how the conversations flow naturally. Make them a friend before you make them a customer.

Key Takeaways

1. Engaging potential buyers when they walk into your store is crucial, as studies have shown that asking if they need help can increase close rates significantly.

2. When a customer responds with a push-off statement like "No, I'm just browsing," it doesn't necessarily mean they don't want help; they may be hesitant to commit to assistance because they feel obligated to purchase.

3. Leaning into the push-off statement with confidence and a proactive approach can help start an engaging conversation. Providing options such as gifts, anniversaries, bridal, or self-purchase can make it easier for customers to express their needs.

4. It is important to address customer anxiety about finding the right product and affordability. A friendly, light-hearted approach and a touch of humor can help alleviate their concerns and make them feel more comfortable.

5. Approach customers to help them rather than just selling to them. Building a friendly rapport and making them feel like a friend first can lead to more natural and successful interactions that benefit both parties.

INCREASING PROFITS AND LOYALTY THROUGH CUSTOM AND INDIVIDUALIZED EXPERIENCES

Jeffrey Skaret, Vlora

The fine jewelry industry has seen significant changes over the past number of years. From alternative metals in wedding rings to increased competition from discounters and internet providers, and now the acceptance and popularity of lab-grown diamonds, the fine jeweler has experienced a decline in margins and profitability. As a result, most jewelers have had to find ways to combat and weather these challenges and find new or different ways to regain profitability.

In addition, there has been a growing demand for personalized and individualized experiences across a variety of industries and product categories, including fine jewelry. Consumers, especially younger generations, are increasingly seeking unique and memorable experiences rather than just purchasing what is in the case. It is rare that someone takes the piece that you have in stock as-is.

This reality provides an excellent opportunity for custom jewelry services to re-establish and emphasize your market leadership and expertise. By offering an outstanding customer experience and service through custom jewelry, you can further distinguish yourself from competitors who are unable or ill-equipped to do so.

The process of designing and creating a custom piece can be an engaging and memorable experience for customers. Custom services often involve multiple interactions between you and your customer, fostering a stronger relationship and potential for repeat business or referrals. Position yourself as a provider of unique, personalized, and meaningful experiences rather than just selling standard pieces. This can lead to increased customer loyalty, higher perceived value, higher margins, and a competitive edge.

When you embrace custom services as a key component of your business, you must educate and train your staff to effectively and efficiently manage the presentation and sales process to ensure maximum sales and the greatest profitability. It is also crucial to have a great partner to back you, your store brand, and your shop. Your reputation is on the line with every client, every experience, and every transaction. Do not underestimate the importance of having a solid, dependable custom partner for your business. This means timely and accurate CAD (Computer-Aided Design) drawings, 360-degree videos, lifestyle images to present, and ultimately perfectly executed finished pieces delivered on *time* to properly represent and uphold the standards and values of *your* company. CADs, videos, and renderings should have your logo.

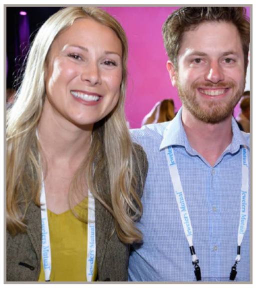
Once you have implemented custom jewelry services into your business as a serious revenue stream and an on-purpose strategy, you should begin to realize greater sales, better margins and profits, and more satisfied and loyal customers.

Key Takeaways

1. Having a dependable custom partner is crucial for executing custom jewelry projects successfully. Timely delivery of accurate CADs, videos, and renderings with your logo is essential to upholding your business's standards and values.

2. To effectively manage the custom jewelry sales process and ensure maximum profitability, it is important to train and educate your staff. Position your business as a provider of meaningful experiences rather than just selling standard pieces to increase customer loyalty and perceived value.

3. Implementing custom jewelry services as a revenue stream strategy can lead to increased sales, better margins, and profits, as well as more satisfied and loyal customers. By delivering custom pieces on time and as promised, you can build trust and confidence with your clients.



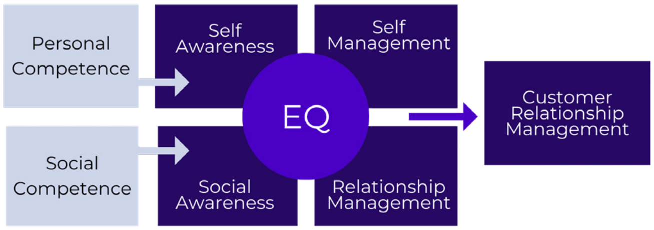
INTEGRATING EMOTIONAL INTELLIGENCE INTO YOUR CRM STRATEGY

Andy and Carin Martin, Wishfluence

Individuals with high emotional intelligence (EQ) excel in various areas, including interpersonal connections, decision-making, stress management, conflict resolution, and job satisfaction. In sales, EQ is pivotal in preventing distractions and ensuring effective communication and trust-building. Those with high EQ make, on average, $30,000 more per year in the United States.

EQ comprises personal and social competencies, such as self-awareness, self-management, social awareness, and relationship management. When cultivated, these skills enhance decision-making, adaptability, empathy, and effective communication. Customer relationship management could be considered the fifth part of EQ for sales professionals.

EQ can be measured through assessments that identify strengths, weaknesses, and areas for development. Unlike personality or IQ tests, EQ assessments provide actionable insights for personal growth and professional success. Strategies for improving EQ include journaling, breathwork, positive self-talk, active listening, and developing strong relationships through consistent interactions and genuine communication.



Customer Relationship Management (CRM) encompasses principles, practices, and tools for engaging customers effectively. A CRM tool streamlines interactions, enhances customer experiences, and fosters authentic relationships. There are many types of CRM tools, and a mixture of manual and digital tools will be needed to fit your needs. Examples include Point of Sale (POS), Excel spreadsheets, lists, calendars, address books, three-ring binders, index cards, social media, your website, reputation management, email, phone calls, deliveries, attending community events, text messaging, mailers, advertising, and in-person interactions.

Integrating EQ into CRM strategies involves personalized interactions, branded experiences, and consistent communication across digital platforms and in person. Emphasizing authenticity and uniqueness enhances customer loyalty and satisfaction. Fifty-five percent of the jewelry industry is comprised of independent jewelers, meaning that most stores have unique experiences to offer their customers. Connecting digital CRM tools to marketing platforms enhances efficiency, accuracy, and customer engagement.

Efficient and effective CRM processes are essential for productivity and achieving desired outcomes. S.M.A.R.T. (specific, measurable, attainable, relevant, and timely) goals and measurable outcomes help evaluate the success of CRM strategies, ensuring a high return on investment (ROI) and customer satisfaction. Your CRM tools should allow you to measure your input and output using data such as prospective customers added, wish list items added, foot traffic, outreach, and sales. Conversion ratios and measured customer actions provide an accurate look at your customer relationship management outcomes and ROI.

Key Takeaways

1. Emotional intelligence (EQ) is crucial for success, enhancing interpersonal relationships, decision-making, and job satisfaction. Higher EQ individuals earn significantly more annually. EQ involves personal and social competencies such as self-awareness and relationship management, which are vital for roles like sales, where trust and communication are key. EQ assessments and improvement strategies, including journaling and active listening, provide actionable personal and professional growth insights.

2. Customer Relationship Management (CRM) involves principles, practices, and tools for engaging customers effectively to enhance experiences and foster authentic relationships. Utilizing manual and digital tools like POS systems, Excel spreadsheets, social media, email, and in-person interactions can help sales professionals connect with customers on various platforms.

3. Integrating EQ into CRM strategies by emphasizing authenticity and uniqueness in customer interactions can increase loyalty and satisfaction. Setting S.M.A.R.T. goals and measuring outcomes through data analytics help evaluate the success of CRM strategies, ensuring productivity, high ROI, and customer satisfaction.

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THE VALUE OF LOYALTY: HOW TO INCREASE CUSTOMER RETENTION & SALES

NICOLE LEINBACH, RETAIL MINDED

Whether buying gifts for others or creating momentous keepsakes near and dear to your heart, jewelry offers an ever-evolving reason for consumers to spend. But let's face it—the competition is tough nowadays, with an endless count of online retailers for customers to explore and what seems to be nearly equal as many brick-and-mortar shops to choose from. Factor in social media, digital marketing , sponsored advertising, local media efforts, peer-to-peer referrals, and the competition can often leave businesses exhausted. But it doesn't have to.

According to a study by Deloitte Consulting, companies that track customer loyalty are up to 60% more profitable than those that don't. Loyalty programs, as defined by *Wikipedia*, are "structured marketing efforts that reward, and therefore encourage, loyal buying behavior—behavior which is potentially beneficial to the firm." In the case of retailers, this translates to more frequent shoppers and increased purchases from repeat customers. And in the case of your unique business, this translates to opportunities to increase sales while strengthening customer retention. In other words, loyalty should lead your marketing efforts to help make 2024 and all the years to follow among your best, most profitable yet.

LOYALTY 101

Loyalty programs have evolved from rewarding customers with incentives to shop to offering birthday month perks in the value of dollars or complimentary gifts to delivering loyalty discounts, special events, or other incentives exclusive to those opted in as part of your loyalty program.

Forty-something Indiana resident Laura Rahilly explains, "If there's an option to get rewarded to shop beyond customer service, I'm in. This will definitely steer me towards one store versus another—even if both have great customer service and quality product. But more so, I like shopping at places that I feel like know who I am or genuinely appreciate me being there."

Reinforcing this is a University of Chicago study that identified customers amplify their frequency of purchase by 20% as they approach earning a reward, as well as buy 20% more products during a shorter time period when a reward is their motivation. With stats like this, it's nearly impossible to ignore the opportunities in customer loyalty.

STAYING LOYAL

Sixty-something Sharon Beverly is a widowed, full-time professional from Colorado who enjoys shopping for herself and her nine grandchildren. Her most favorite purchases? Jewelry.

"I am on a budget, so every penny I spend matters. But make no mistake, I love my fine jewelry purchases. When I consider where I shop, I always consider supporting both my local community and supporting businesses that also support me," explains Beverly. "No one offers customer service like my favorite local stores. I return to them for that, but also because they make me want to stay loyal through the various events that happen each year. I don't feel like a number to them. I feel like a someone to them."

Among the perks to consider for your own loyal audience may include:

- Special discounts for loyalty members only vary per season, month, or holiday. Over time, these discounts may become ones your members look forward to and plan on for their purchases and spending.
- Free gifts with purchases that vary each month, giving customers a reason to return to shop. Gift ideas may include a cleansing cloth, jewelry cleaner, a pair of stud earrings, a charm bracelet or simply a charm, an invitation to in-store events, pre-sale shopping experiences, and much more.
- Hosted experiences with invitations to loyalty members only that may include an annual Valentine's Day party, a charity event held in-store and encourages shopping, double dollars (points) earned on loyalty rewards during certain times of the year, and VIP shopping services.
- Various reasonable reward offerings that have higher perceived values, encouraging more purchases and greater spending.

The opportunities to create a rewarding loyalty program are endless—the key is to make sure your customers know what the perks of your program are. Be sure they also feel a sense of "special" by being a part of this program and consider ways to stay in touch with them to support your program, as well. Among the ways to include this are:

- Opt-in SMS (text) message marketing that alerts members monthly or as needed of member-only loyalty incentives.
- Snail mail invites once or twice a year that both thank them for their loyalty and offer an incentive for them to return to your store.
- Email marketing updates on new inventory arrivals, customized jeweler options, appraisal services, and other alerts that highlight your inventory, team, and services.

LOYALTY HIGHLIGHTS

When incorporating a modern loyalty program into your business, it's important to leverage a CRM (customer relationship management) system that integrates into your POS (point of sale). This will then seamlessly collect data from your consumers, ultimately revealing to you best-selling items, most loyal customers, average dollars per transaction sold, and more.

Additionally, loyalty programs are most effective when the sign-up process is easy. So identifying a streamlined way to both encourage customers to sign up and your team to make it a priority to sign customers up is critical. Aim to make this part of your check-out procedure, but for those customers who may not be ready to make a purchase, don't ignore the chance to get them signed up. Use store signage, make employee-to-customer communication key, and set goals on how many members you sign up weekly or monthly.

Finally, remember that offering rewards that feel rewarding to your customers is key. Get creative. Personalize them if you can. Ask customers for feedback. And don't be afraid to make revisions and mix things up. The goal is to get your customers excited. Like a kid in a candy store, you want to get your customers excited to the point of them wanting to come back again and again… and again.

Key Takeaways

1. Loyalty programs can significantly impact a business's profitability. Companies that track customer loyalty are up to 60% more profitable than those that don't, according to a study by Deloitte Consulting.
2. Loyalty programs have evolved from simple incentives to offering personalized perks such as birthday month rewards, discounts, exclusive events, and other incentives to encourage repeat purchases.
3. Customers tend to increase their purchase frequency by 20% as they near earning a reward, and they buy about 20% more products when motivated by a reward. This illustrates the power of loyalty programs in influencing customer behavior.
4. It is crucial to communicate the benefits of the loyalty program clearly and make signing up easy to encourage customer participation. Additionally, leveraging CRM systems and regularly updating rewards to keep customers engaged and excited are key to a successful loyalty program.

UNLOCKING THE POTENTIAL: SELLING MORE PRECIOUS AND RARE COLOR

Kristen Scheibel, Mark Henry Jewelry

Precious and rare gemstone jewelry is a category with a high level of untapped potential for jewelry retailers. With an increased focus and properly positioning the category, you can add incremental business and reap many benefits. First, you must understand the potential and what steps you can take to unlock it.

According to Jewelers of America, colored stone jewelry sales (excluding pearls) account for only 9% of a retail jeweler's sales. However, the average gross margin is 51% (while the average gross margin of a jewelry store, according to The Retail Owners Institute, is 42.6%). This tells us there is much room to grow and, at the same time, healthy profits to be had.

In an interview with CNBC, Ankur Daga, the CEO of the e-commerce jewelry brand Angara, shared some current trends in the marketplace. Over the past three years, wholesale prices are up 12-17% for precious color, driven by a growing demand. One area showing significant growth is the bridal rings. He specified that more than 15% of engagement rings currently on the market are colored gemstones, up 5% from a decade ago. There are signals that this will continue to grow. Daga said that Millennials and Gen Z are showing interest in sapphires, emeralds, rubies, and tourmalines as engagement rings, as evidenced by current social media analytics. On TikTok, *#emeraldengagementring* has 37 million views, and *#sapphireengagmentring* has over 65 million. And per the *Pinterest 2024 Wedding Report*, searches for "Blue Wedding Rings" were up 155% in 2023. He also shared that although many people are turning to lab-grown diamonds, 75% of customers shopping for color still prefer natural. This presents an added opportunity for precious and rare gemstones.

There are some key strategies a jewelry retailer and their sales teams can implement to grow the category and see positive results. First, a retailer must examine how they have the category positioned in their store. The case-line placement should be both prominent and aesthetically pleasing. The assortment should be thoughtfully curated, kept current, and represent a range of program classics to hero pieces. Marketing efforts and budgets should also include allocations for fine color, including all digital efforts. Ideally, there should be at least one sales team member who is exceptionally passionate and knowledgeable about fine color to champion the category. Having someone in-house who is a Certified Gemologist® (CG) or Graduate Gemologist® (GG) is also a plus. In short, the category's success will be in line with the importance placed on it by the retailer.

Sales teams can deploy several different strategies to boost their success rate in fine color. They should understand that the category holds promise for all customers, including bridal clients, self-purchasers, fashion customers, and gift shoppers. Within each category, there are specific ways to clientele and cultivate added sales. You can create demand for the category by deploying some subtle strategies. Developing your clients into "collectors" can also bring tremendous opportunity in the form of repeat/multi-item sales, custom projects, and one-of-a-kind jewelry in rare gemstones. Phenomenal gemstones are also an area of opportunity as they are so intriguing and lend themselves well to demonstrations at the counter.

Improving performance in precious and rare color gemstones is a long-term strategy that will take some time to reach its maximum potential but will pay off exponentially. It can help a retailer differentiate in their market and grow sales volume, profit margins, and success for both the retailer and their sales teams.

Key Takeaways

1. The category of precious and rare gemstone jewelry presents a high level of untapped potential for jewelry retailers. By increasing focus and properly positioning this category, retailers can add incremental business and reap significant benefits.
2. Colored stone jewelry sales have an average gross margin of 51%, higher than the average gross margin of a jewelry store, which is 42.6%. This indicates there is ample room for growth and healthy profits to be made in this category.
3. Current trends show a growing demand for precious colored gemstones, particularly in bridal rings. Millennials and Gen Z are increasingly interested in gemstone engagement rings, with significant activity on social media platforms like TikTok and Pinterest.
4. Retailers can improve their performance in the precious and rare gemstone category by ensuring prominent and aesthetically pleasing placement in-store, curating a thoughtful assortment, allocating marketing budgets for digital efforts, and having knowledgeable sales team members who can champion the category.

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CONSIDERING AN EMPLOYEE OR ADULT CHILD AS YOUR BUSINESS SUCCESSOR

Patrick Carrol and Todd Feldman, Obsidian Business Planning Solutions

As owners consider the future of their companies, many weigh transferring them to either outside third parties (financial and strategic buyers) or insiders (co-owners, key employees, and adult children). This abstract focuses on sales to insiders: the motives, obstacles, and possible strategies.

MOTIVES FOR SALES TO INSIDERS

Legacy

Owners often consider transferring their businesses to insiders for reasons related to their legacies, such as preserving the culture they've created, safeguarding their employees' jobs, continuing to serve customers they care about, and seeing their companies live on after they leave.

Smooth Transition

Owners also anticipate greater control in a transition to insiders and a smoother transition since successors are already familiar with their companies' operations.

OBSTACLES TO SALES TO INSIDERS

Desired Proceeds

The number one obstacle owners foresee when considering an insider sale relates to money. In this assumption, they are correct: It's rare for successors' pockets to be as deep as those of third parties.

In addition to deep pockets, a company sells for what the market will bear when a sale is conducted as a competitive auction (multiple prospective buyers bidding at once) rather than privately (a negotiation with a sole buyer). That amount may be more than insiders are willing to pay.

And yet, many owners choose to accept a lower sale price in exchange for putting their companies in the hands of successors they know and trust.

It's important to note that advisors can help owners craft transaction structures that deliver a fair return on their company investments.

Ready and Willing Successors

Not all adult children dream of running their parents' businesses, and not all who do can do so successfully. A clear-eyed assessment of a potential successor's skill is critical to planning for an insider transfer.

Cash Flow

In sales to insiders, company cash flow plays an enormous role since it must support the successor's payment of any promissory note.

Employee or Family Morale

When owners choose one adult child or one employee (or even several) over others, those not chosen may react in ways that are unacceptable to owners. An insider transfer can potentially discourage employees or destroy relationships with family members.

OVERCOMING OBSTACLES

No transition is completely free of obstacles, but given healthy company, sufficient time, and thoughtful planning, owners can overcome the most common obstacles.

Reaping a Fair Return

It's possible to structure a transfer of ownership that fairly rewards owners for lifetimes spent investing in their companies. Owners can hold promissory notes for successors and hold on to all or a majority share of equity until the notes are paid in full. They can also receive sale proceeds in a combination of salary, distributions, and perks.

Please keep in mind that there's a benefit to assigning to a company a lower purchase price (or lowest defensible value) if an owner's goal is to gift a portion of their equity to their successors.

Prepared Successors

Again, given sufficient time and with clear communication of expectations between the parties, owners can teach their successors how to successfully lead the business.

Employee/Family Morale

For most owners, their businesses constitute their most valuable asset. To distribute assets fairly among all their children, owners often use their estate plans. Numerous elements go into determining what's fair to all children rather than what's equal, and skilled advisors can help owners work through these issues.

Minimizing Owner Risk

No matter the type of successor, transitions of ownership involve risk. In a third-party sale, providing accurate numbers and carefully negotiating warranties and representations in the purchase contract can help protect owners. In an insider transfer, the transfer can falter despite planning and a buyer's and seller's best intentions. In that case, it's prudent to implement buy-back agreements that allow the company to reacquire any transferred stock.

Having a Plan B

When owners transfer their companies to multiple children, it's critical to determine—before the transfer begins—what will happen if certain events occur. To name just a few possibilities: (1) all but one of the new owners wants to sell, (2) the new owners don't get along, (3) the new owners disagree about their vision for the company. Buy-sell and other agreements among the successors and between owner and successor can determine how situations like these will be handled before any party has a vested interest in the result.

Key Takeaways

1. Owners often face challenges with desired sale proceeds, as insiders typically lack the financial capacity of third-party buyers. Assessing successors' skills, cash flow, and morale impacts is crucial.

2. With proper planning, owners can structure ownership transfers for a fair return on investment. Using promissory notes, lowering the purchase price, preparing successors, and consulting skilled advisors can help.

3. Before transferring a business to insiders, owners should evaluate their financial needs, goals, successors' leadership ability, and risk tolerance. They should consult skilled advisors to ensure a successful outcome for all parties.

ELIMINATING MANUAL DATA ENTRY

Dominic Hill, Loupe & Crystal

Independent jewelers and their vendors would like to eliminate tiresome and expensive manual data entry from their business. Vendors have made significant investments in providing e-commerce-grade B2B ordering experiences in an effort to shift from offline, service-based purchasing to online, self-service purchasing, often offering significant incentives. The uncomfortable truth is that few vendors have over 30-40% adoption of their B2B self-service websites a decade after their introduction. So why are most retailers unwilling to use self-service?

The answer is simple: they lack direct incentives. Self-service eliminates manual data entry for vendors, but only at the retailer's expense.

The solution to the problem is equally simple: retailers would be willing to use self-service if they derive a material benefit. One such material benefit is eliminating their own manual data entry at the point of inventory receipt.

The data for each unit of inventory exists on the vendor systems; it just needs a robust, durable mechanism to enter the retailer's system of record.

Here we arrive at the root cause of the problem: connectivity constraints with the retailer system of record. Prevalent POS systems function more as operating systems than simple point-of-sale systems, managing inventory, repairs, and, in some cases, even HR and accounting. This breadth of features, coupled with jewelry-specific features, makes them difficult to replace for specialty jewelers who often feel orphaned from a software perspective.

These legacy POS systems were developed by a cottage industry of jewelry-specific IT providers who pre-date the internet and are not interested in evolving to cloud-driven capabilities (which make connectivity a simple plug-and-play). What they understand themselves—but do not wish their customers to understand—is the heavy toll their customers pay for their unwillingness to embrace the modern era.

Until retailers have modern cloud-based POS systems, the uncomfortable truth is that robust data connectivity (think "bridges") is not possible. Instead, legacy data exchange protocols (think "boats") with inherent limitations in terms of capacity and availability will prevail, necessarily disappointing the retailers who sit downstream of those limitations and foot the bill.

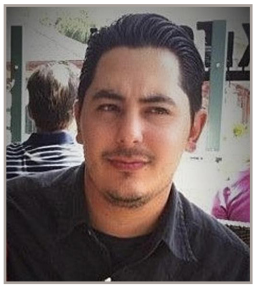
Ultimately, the most important consideration must always be for the consumer's expectation and experience, which is defined by what they see and feel from retailers in other sectors: Other sectors who enjoy the advantages of modern POS systems and the enriched customer servicing they ensure, such as real-time inventory sync between POS and web, meaning they never disappoint a client or clienteling advantages driven by real-time inventory and intelligent prompting ensuring immaculate customer journeys, every time.

The good news is that as of 2024, independent jewelers now have real choices. There are at least three viable cloud POS providers focused only on the jewelry sector, and the most forward-thinking retailers are already switching over aggressively.

Of course, the idea of switching over to a new point-of-sale system fills every retailer with a sense of dread: Will it satisfy our team? Will the inventory value reconcile after migration? There is a proven blueprint for how to ensure you choose the right provider. Retailers might consider listing their needs and expectations in column A of a spreadsheet and placing prospective provider names in the header row of columns B, C, and D. It could be beneficial to book demos with each provider and methodically score each one against their requirements on a scale of 1-10. This approach may help identify the provider with the highest overall score, who is likely to be the best fit for their business.

Key Takeaways

1. The key to encouraging retailers to self-service lies in providing material benefits, such as eliminating manual data entry at the point of inventory receipt.
2. Connectivity constraints with legacy POS systems in the jewelry industry make it challenging for retailers to adopt modern cloud-based solutions, leading to data exchange issues and limitations in capacity and availability.
3. Independent jewelers now have more options with at least three viable cloud POS providers focused on jewelry, and retailers can use a structured approach to choose the right provider by detailing their needs, comparing providers through demos, and scoring them based on requirements to find the best fit for their business.



HOW TO SET UP A SUCCESSFUL E-COMMERCE BUSINESS FOR BRICK-AND-MORTAR JEWELRY STORES HARNESSING DIGITAL POWER TO SHINE ONLINE

Anthony Arechiga, GemFind Digital Solutions

The transition from traditional brick-and-mortar operations to the digital marketplace is a significant step for jewelry stores aiming to expand their reach and increase sales in the modern retail environment. This abstract provides a comprehensive roadmap for traditional jewelry businesses to establish and thrive in the e-commerce space. By dissecting the process into manageable components, the goal is to equip store owners with the knowledge and tools necessary for a successful online transition. The primary purpose is to elucidate the strategic, operational, and technical facets of launching and managing an e-commerce presence effectively.

Building an Online Identity

The first step towards establishing a successful e-commerce business is creating a strong online identity. Brand differentiation is important in an online presence, translating your store's unique value proposition into a compelling online brand. This involves selecting the right domain name, creating a visually appealing logo, and developing a consistent brand voice across all digital platforms.

Website Development and Design

An e-commerce website serves as the digital storefront for your jewelry business, making its design and functionality critical to success. Best practices for website development include focusing on user experience (UX) design principles, product presentation, and the incorporation of secure payment gateways. Website accessibility and discoverability can help reach your target audience through mobile optimization and SEO strategies.

Digital Marketing Strategies

With a well-designed website in place, the next step is to attract visitors. Various digital marketing strategies essential for driving traffic and increasing sales include search engine optimization (SEO), pay-per-click (PPC) advertising, email marketing, and social media marketing. By creating engaging content that resonates with your audience and leveraging analytics, your marketing efforts can be refined.

Customer Engagement and Retention

Engaging with customers and encouraging their loyalty is crucial for long-term success in the e-commerce space. Strategies for enhancing customer engagement include personalized experiences, customer service excellence, and loyalty programs. Technology can be leveraged to facilitate personalized shopping experiences and maintain a dialogue with customers through social media and other digital channels.

Analyzing and Optimizing Performance

Finally, continuous analysis and optimization of your e-commerce operations will help online performance. There are various tools and techniques for monitoring key performance indicators (KPIs), understanding customer behavior, and making data-driven decisions to improve website performance, marketing effectiveness, and ultimately, sales.

Conclusion

The shift to e-commerce offers brick-and-mortar jewelry stores an unprecedented opportunity to reach a broader audience and achieve growth. This article aims to demystify the process of setting up an online business and provide actionable strategies for every stage of the journey. From building a compelling online identity to optimizing website performance, the goal is to empower jewelry store owners with the knowledge to harness the power of digital technology and shine online.

Key Takeaways

1. Establishing a strong online identity is crucial, including brand differentiation, selecting the right domain name, creating a visually appealing logo, and maintaining a consistent brand voice across digital platforms.
2. The design and functionality of your e-commerce website are essential for success. Focus on user experience (UX), product presentation, secure payment gateways, mobile optimization, and SEO strategies to make your website discoverable and accessible.
3. Implement various digital marketing strategies such as SEO, PPC advertising, email marketing, and social media marketing to attract visitors and increase sales. Create engaging content, leverage analytics, and refine your marketing efforts based on data insights.
4. Engage with customers and enhance their loyalty through personalized experiences, excellent customer service, and loyalty programs. Utilize technology to facilitate personalized shopping experiences and maintain communication through social media and other digital channels.
5. Continuous analysis and optimization of e-commerce operations are crucial. Monitor key performance indicators (KPIs), understand customer behavior, and make data-driven decisions to improve website performance, marketing effectiveness, and ultimately increase sales.

CLARITY ENHANCEMENT OF EMERALDS AND BEYOND

Wendi Mayerson, Gübelin Gem Lab New York

Historically, emeralds are some of the most sought-after gemstones. It has long been highly treasured by royalty and is still by celebrities today. Because emeralds—the green variety of the mineral beryl—naturally contain many fractures or fissures (these terms are interchangeable), humans have been enhancing their clarity for more than two thousand years.

Clarity enhancement in emeralds is a process aimed at improving the appearance of the stone by filling its fractures and fissures. These fractures are naturally occurring within emeralds due to three factors:

1. **Chemical composition**: The incorporation of trace elements like chromium weakens the beryl structure.
2. **Mode of formation**: The growth environment, often marked by contact metamorphism, exerts strong shear forces, leading to the formation of fissures.
3. **Mining methods**: Emerald deposits are typically found in hard rock, necessitating the use of explosives, further weakening the stone's structure.

The reason fractures/fissures are visible when they are empty is because they are filled with air. When light traveling through the stone hits the air in a fissure, it is refracted, and as a result, you see a reflection, hence the fissure is visible. To enhance clarity, oils, waxes, and resins are commonly used to fill these fissures. By filling the voids with substances that have a refractive index close to that of the emerald, the disruption of light passing through the stone is minimized, making the fractures less noticeable. The closer the match in refractive index, the better the fissure is hidden. The refractive index of the new man-made resins is so close to that of emerald that the fissures are nearly invisible even when viewed at 67.5x magnification using darkfield illumination in a gemological microscope.

Labs must disclose clarity enhancement due to industry standards set by trade organizations. For consumer protection, anything influencing a gemstone's value or impacting its care must be disclosed. Detecting clarity enhancement in emeralds involves assessing factors such as the number, position, size, and orientation of the filled fissures. This is done visually, using a gemological microscope, fiber optic light source, and sometimes ultraviolet light. Labs will also detect clarity enhancement instrumentally, using infrared and Raman spectroscopy.

At a minimum, labs must disclose the amount of filler present in a clarity-enhanced emerald. Word terms commonly used for this purpose include None, Insignificant, Minor, Moderate, and Significant. Sometimes alpha-numeric terms are used, such as F1, F2, F3 (for fissures) and C1, C2, C3 (for cavities). Some labs can also identify the specific fillers used to clarity-enhance emeralds. The specific filler is not as important as the main category it fits into. These individual fillers are most commonly divided into two main categories: Oils/Waxes and Resins. They are referred to as oil-type or resin-type. Some labs use the words "Traditional" and "Modern" to separate the two groups since the oils and waxes have been used for thousands of years, whereas synthetic resins are a new man-made type of filler.

Basic detection of clarity enhancement can be done outside of a lab utilizing a gemological microscope and a fiber optic light source. Evidence of partially filled fissures includes flattened high-relief gas bubbles in partially filled fissures or dendrites of dried filler. Fissures filled with man-made resins will show a flash effect when viewed parallel to the fissure using fiber optic light. The colors of the flash seen in the filled fissures occur in pairs. The most common color pair is yellow and blue, but they can also be pink and orange. Additionally, using long- and short-wave ultraviolet light can sometimes reveal reactions within the fissures, aiding in filler detection.

It should be noted that clarity enhancement is not limited to emeralds; any transparent gemstone with surface-reaching fractures or fissures can undergo this process. Today, popular gemstones also subject to clarity enhancement include Paraíba tourmalines, alexandrites, unheated rubies, and sapphires.

The techniques discussed for detecting clarity enhancement in emeralds also apply to identifying filler in other gemstones. Thus, a comprehensive understanding of these methods is crucial for gemstone evaluation.

Key Takeaways

1. The practice of enhancing the clarity of emeralds by filling fractures and fissures has been ongoing for over two thousand years. Factors such as the chemical composition, mode of formation, and mining methods contribute to the presence of fissures in emeralds.
2. Oils, waxes, and modern resins are commonly used to fill the fractures in emeralds, aiming to minimize the visibility of fissures by matching the refractive index of the filling substance with that of the emerald. This enhances the appearance of the stone.
3. To ensure consumer protection, industry standards mandate disclosure of clarity enhancement in gemstones. Detection methods involve visual examination under specialized equipment, such as gemological microscopes, fiber optic light sources, and sometimes infrared and Raman spectroscopy.
4. The techniques used to detect clarity enhancement in emeralds can be applied to other gemstones with surface-reaching fractures or fissures. Gemstones like Paraíba tourmalines and alexandrites, as well as rubies and sapphires, may also undergo clarity enhancement processes.

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DIAMOND CUT DESIGN AND PERFORMANCE

Al Gilbertson, CG, and Brock Wilke, RJ, GIA

In late 2020, GIA and AGS quietly began collaborating to create a cut grading system for fancy shapes. The Everest project name draws inspiration from Ed Viesturs, a renowned climber who has summited Everest seven times. Viesturs's philosophy, "Getting to the top is optional; getting down is mandatory," is reflected in the project's approach of developing a system that would not impede the industry's growth or harm any industry sectors.

Have you asked your employees or customers what makes diamonds beautiful or distinctive? We found that the allure lies in the play of light and dark created by the diamond's movement. Certain contrast patterns are visually more captivating. Most also appreciate symmetry in the pattern and shape. But what elements are purely a matter of personal taste and perspective? Because of this question, Everest also involves cut analysis based on objective observations of thousands of diamonds.

Diamonds exhibit distinct light and dark patterns, forming their unique design. These patterns hold the key to understanding a diamond's appearance. Upon examination, one notices more facets beyond the apparent surface design. It's akin to observing a hall of mirrors or a kaleidoscope, where we see interconnected, fragmented reflections or "virtual facets."

The unique virtual facets of a diamond's appearance become its fingerprint. Understanding these patterns allows for a deeper insight into what we see in the diamond. Whether we are looking to understand the diamond's performance, determine what makes each shape unique, or understand what we see, the diamond's virtual facets are key to unlocking our understanding.

We can analyze the impacts of both small and large virtual facets and their motion using ASET and its predecessor (Al Gilbertson's original color and angle setup) in 3D computer simulations. Large areas of small virtual facets create clusters of pinpoint sparkles that some call "crushed ice." These clusters seem to have quick movement. In contrast, large facet reflections typical of old-style cuts or the areas around a bow tie move slowly.

Research in vision science (see Optimizing Face-up Appearance in Colored Gemstone Faceting) indicates that a gem's brightness and attractiveness depend not only on how much light is returned but also on the contrast pattern or distribution of dark and light virtual facets.

Fancy shapes are more complicated than rounds. For example, a set of eight pears can show a variety of appearances and outlines. There are different levels of bow ties, crushed ice, and other visual aspects. The outlines vary, not only with length-to-width differences but also with broad or narrow wings and shoulders. Many of those are taste factors.

GIA took varied shaped diamonds worldwide to understand people's preferences and tastes. There was strong agreement that diamonds with poor contrast were not preferred. Certain kinds of distribution patterns with strong contrast were preferred. Some liked the hearts and arrows pattern cushion, while others didn't. This limited global consensus showcases how taste can vary. We were most surprised by what the trade calls "crushed ice." Equal numbers (1) preferred it, (2) saw it as pretty good, (3) thought it was just okay, and (4) disliked it. We've observed over 25,000 fancy-shaped diamonds at GIA, identifying preferred patterns through extensive studies.

There is a crucial issue: Manufacturers must be able to predict cut quality when planning, or we can't implement a useful cut grading system. Fancy shapes, with their numerous variables, complicate this. Furthermore, understanding diamond taste factors necessitates manufacturers choose which ones to use to fit different client market niches.

At present, diamond manufacturers can create precise 3D models of rough diamonds by scanning their exteriors and mapping inclusions and color, allowing them to predict the color and clarity of the final cut quality very closely. Using specialized software, they can generate multiple cutting solutions, optimizing the carat yield and the total value of the diamond. This process, known as allocation, considers the liquidity of the carat size, shape, and quality, helping manufacturers make the best choice for the final cut.

We're collaborating with manufacturers by creating libraries of facet arrangements for various shapes and cutting qualities in their software. This allows them to optimize yield while maximizing appearance. Our recent math journal publication demonstrated software that generates hundreds of thousands of facet arrangements. GIA is transforming design possibilities by creating a wide range of unique facet patterns for all shapes and then choosing those with the best potential.

These solutions are tailored to fulfill the needs of consumers, retailers, and manufacturers alike. They include comprehensive reports and exclusive access to segments of our planned advanced digital platform. We want to empower the industry with useful, easy-to-use tools, services, and thorough education.

For Everest to truly meet the needs of all, we must equip manufacturers with the right cutting guidelines and support tools tailored to meet the latest standards and design innovations through access to our innovative platform.

Key Takeaways

1. The play of light and dark in diamonds' movement creates allure, with certain contrast patterns and symmetry being particularly captivating. Objective cut analysis based on thousands of diamonds guides our understanding of what makes each shape unique.

2. Diamonds' appearance is defined by distinct light and dark patterns forming unique virtual facets, akin to interconnected reflections in a hall of mirrors. Analyzing the impact of virtual facets through tools like ASET reveals key insights into a diamond's performance.

3. Consumer preferences for diamond appearance vary globally, with strong agreement that diamonds with poor contrast are less favored. Different distribution patterns, such as crushed ice or hearts and arrows, are preferred by different people, highlighting the complexity of taste factors.

4. Manufacturers can now create precise 3D models of rough diamonds to predict cut quality, optimize carat yield, and maximize appearance using specialized software. Collaboration with GIA offers access to a library of facet arrangements for various cutting qualities, empowering the industry with cutting-edge tools and education.

LAB-GROWN DIAMONDS: SCREENING CHALLENGES

Guy Borenstein, Stuller Inc.

Lab-grown diamonds can only be identified correctly using advanced techniques that unveil properties invisible to the human eye. These new effective techniques command deep scientific understanding and access to state-of-the-art spectrometers and imaging instruments that can record and display the diagnostic features.

Gaining such a level of scientific laboratory expertise is virtually impossible for the individual jeweler (or gemologist/appraiser) in terms of budget and knowledge. Therefore, a series of simplified versions of the comprehensive instruments were introduced to the market to overcome the knowledge barrier. The more affordable tools, occasionally called “screeners” or “DVI” (Diamond Verification Instruments), aim to serve the average retailer.

The goal of most screeners is straightforward. They are designed to inspect one or two properties unique to natural or lab-grown diamonds. Their concept is simple: One does not need to understand the science behind it—the device will give a simple visual (color-coded) or binary (Pass/Refer) answer, providing a reassuring simplicity to the user.

Most screeners cannot identify all stones. They can only sort out confirmed natural/synthetic stones and refer the rest to further advanced testing. Moreover, some devices’ ability to identify the diamond origin and simulants is limited to specific cases. Each machine has blind spots, weaknesses, and limitations. These should be considered and understood to ensure accurate and reliable results, instilling in the user a sense of caution and awareness.

The Common Screening Technologies in the Market

LW/SW UV fluorescence: These devices include a closed dark chamber and two light sources: long-wave ultraviolet (LWUV; 365nm) and short-wave ultraviolet (SWUV; 254nm).

Around 35% of natural type Ia diamonds fluoresce under LWUV, mainly in blue. Some also fluoresce under SWUV with a weaker intensity. Lab-grown colorless diamonds rarely fluoresce under LWUV. They may fluoresce under SWUV (weak green/orange/yellow/red) but are always stronger than LWUV. In addition, most HPHT-grown stones will also show long-lasting phosphorescence under SWUV.

SWUV internal transmission/reflection: The main idea is to separate type IIa diamonds (of natural or lab-grown origin) from the other types by illuminating the stone with one or more short-wave ultra-violet (SWUV) light wavelengths and recording its absorbance (or transmittance) within the material. The devices are divided into two configurations: closed chamber and handheld.

Natural diamonds of type Ia absorb SWUV light and prevent it from passing through. type II stones enable SWUV light to pass through or reflect from their inner facets. Moissanite allows some of the SWUV wavelengths to pass through it and reflect.

Fluorescence/phosphorescence imaging: The main idea is to separate natural diamonds from lab-grown stones and simulants by illuminating them with high energy and recording their fluorescence. The device comprises a chamber with a deep UV light source integrated at the top.

Most natural type Ia diamonds show a unique blue to greenish-blue fluorescence, which virtually does not exist in lab-grown stones. HPHT-grown stones show a typical neon-like bright green fluorescence with a long-term (>10sec) phosphorescence. CVD-grown diamonds can present any warm spectrum shade (yellow, orange, red, pink, purple). Cubic zirconia and synthetic moissanite will display dark green and black (inert) responses, respectively.

Fluorescence spectroscopy: These screeners are simplified versions of advanced fluorescence spectrometers. The devices include a box with a monitor and a flexible goose-neck fiber-optic probe connected to a spectrometer inside.

Aggregated nitrogen atoms within a natural diamond’s atomic structure commonly create a defect called N3. This defect, identifiable by the device’s spectrometer, is a unique feature of natural type Ia diamonds, and it is almost impossible to replicate it in lab-grown diamonds and simulants.

Other Screening technologies

Phosphorescence decay: These devices use filtered SWUV to excite fluorescence and phosphorescence in diamonds. They include a chamber comprising a SWUV light source, a fast-reaction digital camera, and an outer tablet as an interface.

These devices’ technology is based on a “time-resolved” surface luminescence analysis of a diamond. Over 99% of natural stones (types I and II) show a fast-decaying (8ms) blue phosphorescence, which differs from the non-phosphorescent or long-lived effect of lab-grown diamonds.

UV Spectroscopy: A simplified UV-Vis spectrometer excels in identifying diamond types,especially type Ia natural diamonds.

Multi-technology screening: Two to three combined technologies can be used in one instrument to check for several features, thus reducing the risk of error.

The ASSURE 1.0/2.0 Project

To facilitate the comparison, the Natural Diamond Council offers an unbiased testing program for diamond verification instruments called the “ASSURE Program.” ASSURE uses two third-party laboratories to assess the relative performance of the diamond screeners available on the market. The results are published online on its website (naturaldiamonds.com/council).

The results are divided into Assure 1.0 (launched in 2019; 33 instruments tested) and Assure 2.0 (2022; nine instruments to date).

The sample test includes 1,000 natural diamonds, 200 lab-grown diamonds, and 200 simulants. The Assure 2.0 includes newer market samples and expected “future samples.” It also inspects open- and closed-back mounted stones and the instrument’s consistency of results.

The program does not endorse or rank the testing technologies. Instead, it provides a library of the instruments’ data sheets with their performance results.

Key Takeaways

1. Lab-grown diamonds can only be accurately identified using advanced techniques and specialized instruments that are not easily accessible to individual jewelers or gemologists.
2. To overcome the knowledge barrier, simplified versions of comprehensive instruments, known as “screeners” or “DVI” (Diamond Verification Instruments), have been introduced to the market. These screeners aim to serve the average retailer by providing simple visual or binary answers.
3. Most screeners can only identify confirmed natural or lab-grown diamonds and refer the rest for further advanced testing. Each machine has its own blind spots, weaknesses, and limitations.
4. The market offers various screening technologies, including LW/SW UV fluorescence, SWUV internal transmission/reflection, fluorescence/phosphorescence imaging, fluorescence spectroscopy, and phosphorescence decay, among others.
5. The ASSURE program, offered by the Natural Diamond Council, assesses the performance of diamond screeners available on the market and publishes the results online. It does not endorse or rank the technologies but provides data sheets with performance results.

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THE MICROWORLD OF TOURMALINE

Nathan Renfro, GIA

Tourmaline is a borosilicate mineral supergroup with a trigonal crystal structure. It generally forms elongated prismatic crystals with a triangular cross-section and is often significantly color-zoned. This color zoning results from modifications and changes in the nutrient solution from which the tourmaline crystallizes or possibly from changes in temperature during growth.

Due to the wide range of chemical variations possible in this mineral group, there are now over 40 recognized tourmaline mineral species. Most gem-quality tourmalines are the lithium-rich species, elbaite, and are most commonly found in granitic pegmatites where elements like boron and lithium have been concentrated.

Tourmalines can also form in metamorphic rock, including marbles and schists; however, many of those tourmalines will be schorl or dravite varieties and may not be suitable for gem use. The most highly prized gem tourmalines are the vividly colored green to blue copper-bearing varieties known in the trade as Paraíba tourmaline, named after the state in Brazil where they were first discovered.

However, today, copper-bearing Paraíba-type tourmalines have also been found in Mozambique and Nigeria. Paraíba-type tourmalines are most often the elbaite species, but liddicoatite examples have also been found.

When examining gem tourmaline under the microscope, common inclusions will include growth tubes that often result from a localized interruption of the crystal growth, leaving behind hollow or fluid-filled tubes. These are sometimes referred to as a "growth blockage." When these tubes are sufficiently dense, they are responsible for producing cat's eye stones when the tourmaline is oriented properly and cut into a cabochon.

Fluid inclusions are often encountered in gem tourmalines, many of which are referred to as "trichites" when they show a thready or hair-like structure. Fluid inclusions may also sometimes be encountered as three-phase inclusions containing liquid, gas, and solid components. When tourmalines that contain fluid inclusions are heat treated, these fluid inclusions will often rupture, leaving fractures in the stone, which are sometimes hidden by filling the fractures with oils or resins.

Many other gem tourmalines typically contain mineral inclusions that would occur in a pegmatitic growth environment. These could include minerals like pyrochlore, feldspars, and mica. Tourmaline crystals can also be found as inclusions in other pegmatitic minerals such as quartz, mica, and aquamarine.

Key Takeaways

1. There are over 40 recognized tourmaline mineral species due to the wide range of chemical variations possible in this mineral group. Gem-quality tourmalines are commonly elbaite, a lithium-rich species found in granitic pegmatites.
2. Tourmalines often exhibit significant color zoning, resulting from modifications in the nutrient solution during crystallization or changes in temperature during growth.
3. When examining gem tourmalines under a microscope, common inclusions include growth tubes, fluid inclusions, and mineral inclusions such as pyrochlore, feldspars, and mica. Heat treatment of tourmalines containing fluid inclusions can lead to ruptures in the stone.

Katsurada, Y., Sun, Z., (2017) *Cuprian Liddicoatite Tourmaline.* Gems & Gemology, vol 53, No. 1, pp 34-41.

Thank you to GIA for graciously providing the following for inclusion in the American Gem Society's Annual Recertification Exam

UNDERSTANDING COLORED STONES THROUGH ADVANCED TESTING

Dr. Aaron Palke, GIA

A well-trained and well-educated gemologist can handle a broad range of gemological issues, from treatment and origin to identification, even outside the confines of a modern gem laboratory. Inside the gemological laboratory, basic, traditional gemological testing techniques and tools (e.g., refractometer, microscopy, fluorescence, etc.) often form the foundation of most identification calls.

However, as laboratory growth methods for gems and gemstone treatments have become more sophisticated over the years, and in many cases, it has become crucial to introduce into the gemological laboratory some advanced analytical instrumentation typically only seen in world-class research institutions. The growing importance of geographic origin determination has also recently necessitated the use of advanced instruments for trace element analysis to fingerprint ruby, sapphire, emerald, spinel, and alexandrite from different origins.

Advanced testing in the gemological laboratory can mostly be separated into two categories: spectroscopy and trace element analysis. Here, we will discuss spectroscopy as the instruments used in this field are more readily available outside of an advanced gemological laboratory.

Spectroscopy can be defined as the study of how light, or electromagnetic radiation, interacts with matter. The most obvious example is visible spectroscopy, in which one can measure exactly how visible light from around 400 nm in wavelength (blue/violet light) to 700 nm (red light) is absorbed by a gemstone. In practice, most visible spectrometers can also measure light extending into the near ultraviolet (UV) at shorter wavelengths and near-infrared (NIR) at longer wavelengths. The technique is then more accurately called UV-Vis-NIR spectrometry.

UV-Vis-NIR can be helpful for identifying the specific color-causing agents (chromophores) in a gem. This allows determination of the natural vs. dyed origin of color for jadeite and other materials as well as separation of Paraíba-type tourmaline colored by copper from indicolite tourmaline colored by iron.

Heading further into longer wavelengths of light is a technique called Fourier Transform Infrared Spectroscopy (FTIR). This form of spectroscopy probes the vibrational patterns of a material, which change depending on the material and possible treatment history. This technique is particularly useful for diamond-typing, such as type Ia, Ib, IIa, and IIb, based on the presence or absence of detectable nitrogen or boron.

Diamond typing with FTIR is an indispensable tool for detecting possible laboratory-grown diamonds and deciding the next steps in determining possible treatments for natural diamonds. FTIR spectroscopy can also be useful for identifying some treatments for ruby and sapphire by looking for the presence of a 3309 cm-1 series (peaks at 3309, 3232, and 3185 cm-1), which can be a diagnostic indicator of low-temperature heat treatment in Mozambique rubies and Madagascar pink sapphires among other sources. Most gems will also have a characteristic vibrational pattern, which can help with basic material identification and even separate some natural gems from laboratory-grown gems like alexandrite.

The polymers, resins, and oils used to enhance clarity in many gems also have characteristic vibrational patterns, allowing FTIR to confirm the presence or absence of clarity enhancement in emeralds and other gems.

Key Takeaways

1. While traditional gemology can never be replaced, advanced instrumentation is key to identifying certain treatments and aiding in the separation of natural and laboratory-grown gems. This is essential for accurate identification and understanding of gem properties.

2. Advanced analytical instruments in the gemological laboratory are generally separated into those that perform trace element analysis and spectrometers. Spectroscopy, focusing on the interaction of light with matter, is more commonly accessible outside advanced gemological labs, making it a crucial tool for gem analysis.

3. Different spectrometers probe different portions of the electromagnetic radiation spectrum (e.g., UV-Vis-NIR vs FTIR spectrometers) and can provide information on the chromophores responsible for a stone's color, treatment history, or natural vs. laboratory-grown nature.

4. FTIR is a technique probing vibrational patterns in materials, aiding in diamond typing and detecting treatments in rubies and sapphires. It is valuable for identifying natural versus laboratory-grown gems and confirming clarity enhancement in stones like emeralds.

A VIEW THROUGH THE WATCHMAKER'S LOUPE

Justin Shiver, CSA, Underwood Jewelers

Fostering a culture of collaboration and understanding between the sales team and service department is paramount to providing a high level of customer service. As a watchmaker, I have witnessed the many benefits of assisting sales team members in expanding their knowledge of the steps involved in servicing a timepiece. Here, we will focus on expanding your knowledge of twenty-first-century service standards by demonstrating certain aspects of a systematic approach to servicing a modern mechanical watch movement.

Most watch manufacturers provide technical documentation that defines the performance expectations for their movements. These tolerances may evolve over the lifespan of the watch. Therefore, it is of the utmost importance that the watchmaker uses the most up-to-date version of the technical documentation. In addition, a manufacturer may use different materials to produce different grades of the same caliber movement. The higher-grade version(s) of the movement will have elevated performance expectations.

Below, you will see an excerpt from the technical documentation of a Sellita SW200-1 watch movement showing the rate tolerances and test positions for the different versions of this caliber movement.

Exécution – Ausführung – Range		**Elaboré**	**Top**	**Chronomètre**
Positions Lagen Positions	0 h	(3) CH, 6H, 9H	(5) CH, FH, 6H, 9H, 3H	
Marche moyenne Mittelwert Gang Middle rate		7 ±7 s/d	4 ±4 s/d	Critères COSC COSC Kriterien
Ecart max. toutes positions Max. Abweichungen alle Lagen Max. divergence all positions		20 s/d	15 s/d	

Positions selon les normes NIHS Positionen nach den NIHS-Normen Positions according to the norms NIHS		**Désignations courantes pour horlogers Gebräuchliche Bezeichnungen für Uhrmacher Common designations for watchmakers**
CH	Horizontale, cadran en haut / Horizontal, Zifferblatt oben / Horizontal, dial up	HH - Horizontale Haut / ZO - Zifferblatt Oben / DU - Dial Up
FH	Horizontale, fond en haut / Horizontal, Zifferblatt unten / Horizontal, dial down	HB - Horizontale Bas / ZU - Zifferblatt Unten / DD - Dial Down
6H	Verticale, 6 heures en haut / Vertikal, 6 Uhr oben / Vertical, 6 o'clock up	VG - Verticale Gauche / KL - Krone Links / PL - Position Left
9H	Verticale, 9 heures en haut / Vertikal, 9 Uhr Oben / Vertical, 9 o'clock up	VB - Vertical Bas / KU - Krone Unten / PD - Position Down
3H	Verticale, 3 heures en haut / Vertikal, 3 Uhr oben / Vertical, 3 o'clock up	VH - Verticale Haut / KO - Krone Oben / PU Position UP

The **Elabore** grade is tested in three positions. Dial up, 6 o'clock up, and 9 o'clock up. The goal (middle) daily average rate of these positions is +/-7 seconds a day but will be performing within tolerances with a daily average rate of +/- 20 seconds a day.

The **Top** grade is tested in five positions. Dial up, Dial down, 6 o'clock up, 9 o'clock up, and 3 o'clock up. The goal (middle) daily average rate of these positions is +/-4 seconds a day but will be performing within tolerances with a daily average rate of +/- 15 seconds a day.

The **Chronometer** grade is tested in five positions. Dial up, Dial down, 6 o'clock up, 9 o'clock up, and 3 o'clock up. The daily average rate of these positions must be -4/+6 seconds a day.

To achieve the desired performance outlined in the technical documentation, the watchmaker must follow a systematic service procedure when servicing the watch movement.

Precleaning

- Remove hands, dial, and date/day indicator(s)
- Certain caliber movements may require the removal of other components
- Clean partially disassembled movement to allow for more accurate evaluation of components by removing dried lubrication or debris before disassembly

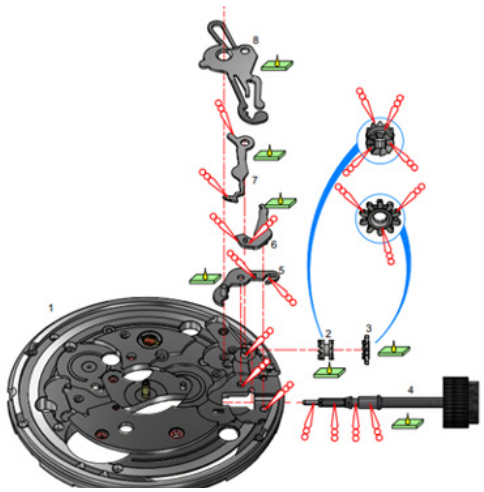
Final Cleaning

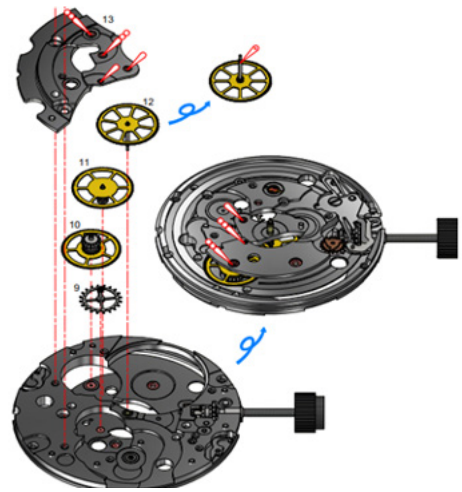
- Complete disassembly of movement
- Inspect components for wear/damage
- Make necessary adjustments during disassembly
- Clean disassembled movement

Once the disassembled movement components have been cleaned, refer to the technical documentation to assemble, lubricate, and adjust the movement to the desired performance level. Below are excerpts of the assembly and lubrication diagrams for the Sellita SW200-1 movement.

Lubrification – Schmierung – Lubrication		
	Huile épaisse ou graisse – Dickflüssiges Öl oder Fett – Thick oil or grease	**Moebius HP-1300** ou **Moebius D5**
	Huile fine – Dünnflüssiges Öl – Fine oil	**Moebius 9010**
	Très faible quantité – Sehr kleine Menge – Very small quantity	**Moebius 9010**
	Huile spéciale pour levées – Spezialöl für Hebungsstein – Special oil for pallet stones	**Moebius 9410** ou **Moebius 9415**
	Graisse – Fett – Grease	**Moebius 9501** ou **Jismaa 124**

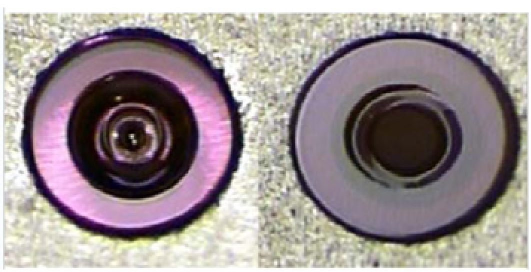
Each lubricant is represented by a symbol. The symbols will be used to show where the different lubricants need to be applied on the assembly diagram below.



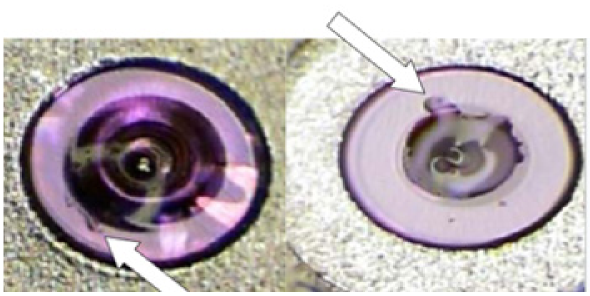


When applying the oil or grease listed in the indicated areas, the watchmaker must be sure to do so in the proper amount. Below are examples of watch jewel lubrication.

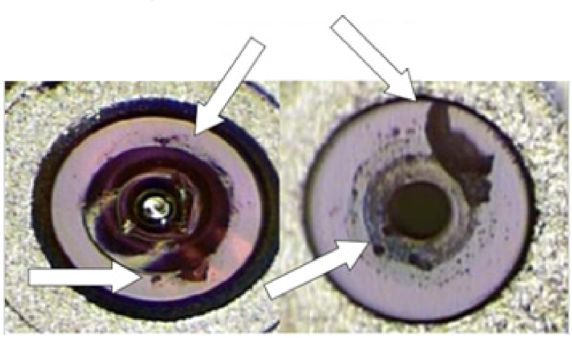
Perfectly Oiled



9010 oil / messy application and beginning to spread

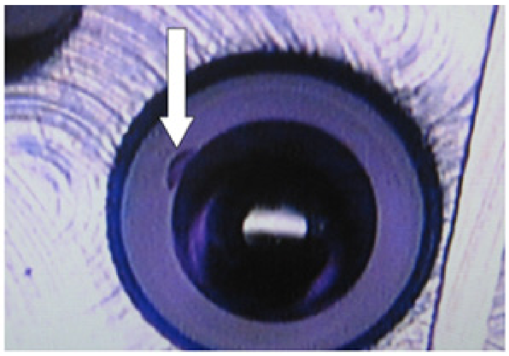


9010 oil / messy application attempted to clean with Rodico



Failing Grade

9010 oil / messy application / cosmetic issue



Understanding some of the steps and procedures involved with servicing a modern watch movement will help a sales team member engage in more informed technical discussions with clients and service departments. While not possible to provide a comprehensive demonstration of all service procedures, seeing snapshots of some service procedures needed to maintain and repair timepieces will help facilitate this understanding.

Key Takeaways

- Collaboration between the sales team and service department is essential for providing excellent customer service when it comes to watches.
- Watch manufacturers provide technical documentation that outlines the performance expectations and tolerances for their movements. Different grades of the same watch movement may have varying performance expectations, with higher-grade versions requiring more precise performance.
- Watchmakers must follow a systematic service procedure, including disassembling, cleaning, lubricating, and adjusting the movement, to achieve the desired performance outlined in the technical documentation.

Sellita Watch CO SA, Technical Documentation SW200-1 cosc.swiss/en

American Watchmakers Clockmakers Institute (AWCI), Oiling Presentation

A HISTORY OF YOUR CV

Joel Hassler, CGA, CGA Instructor, Von Hasle Jewelers

One of the requirements for an appraisal report prepared by an AGS member is to have a curriculum vitae (CV) that represents the true and accurate credentials of the appraiser, preparer, or author of the report. Yet, it is one of the things that is often missing when we review reports. This is your chance to brag a bit, but you don't want to fluff it up too much or embellish beyond what is professional. A well-written and professionally presented CV in your appraisal report will enhance your professional image, showcase your skills and experience, and set you apart from your less qualified competition. A CV for an appraiser should contain:

1. Your name, contact information, current employment details
2. Educational qualifications
3. Professional credentials
4. Work experience
5. Industry organization membership
6. Awards or recognitions
7. Miscellaneous activities

In each category, best practice would suggest only including items relevant to your work in this industry. For example, in 1999, I was one of the first Mazda Master Certified Sales Associates in the country when they reintroduced the title.

That's an example of something that would not be relevant to include on my CV as a jewelry appraiser. But, if you graduated from the Istituto Lorenzo de' Medici in Florence, Italy, with a degree in jewelry design, that would be relevant to your CV as a jewelry appraiser.

If you are an active member of a committee in AGS or have served in a leadership position at your local guild, that would also be worth noting. Depending on where you are in your career, you may have presented at Conclave and submitted articles to Spectra or other jewelry trade publications. You could have a separate section for things like this.

If you have a handful of professional, public-facing entities you have worked for in the past, you could ask permission to use them as a professional reference and include their name, organization, and city/state. This may be attorneys, accountants, law enforcement agencies, etc. In chapter 15 of The Practical Guide to Jewelry Appraising, Cos Altobelli, ECGA, provides an excellent outline of what to include in your CV, and in the index, he includes his CV as a reference for aspiring appraisers. Aside from including it in your appraisal reports, a CV is also a good "resume" or reference sheet to include with marketing letters when soliciting new business. Often, an attorney or accounting firm may reach out while interviewing potential appraisers for their clients. Your CV represents you in printed form, much like a resume.

It should be professional, succinct, well laid out, and easy to read. Just like in your appraisal, don't use abbreviations or titles unfamiliar to a reader. Type out the full title, e.g., John Smith, Certified Gemologist Appraiser, American Gem Society—not John Smith, CGA, AGS.

You should take any opportunity to be more professional and set yourself apart from a competitor. A well-written CV is an easy place to start!

Key Takeaways

- A well-written and professionally presented CV in an appraisal report is essential for showcasing the true and accurate credentials of the appraiser, preparer, or author. It enhances the professional image, highlights skills and experience, and differentiates from less qualified competition.
- An appraiser's CV should include name, contact information, current employment details, educational qualifications, professional credentials, work experience, industry organization membership, awards or recognitions, and relevant miscellaneous activities. Focus on including information that is directly pertinent to the appraisal work being undertaken or relevant to the industry.
- The CV should be professional, succinct, well-organized, and easy to read. Avoid using abbreviations or titles that may be unfamiliar to readers. Present full titles and credentials clearly to ensure understanding and credibility.

APPRAISALS BACK TO BASICS: EVALUATION AND DESCRIPTIONS

Joel Hassler, CGA, CGA Instructor, Von Hasle Jewelers, and Laura Stanley, CGA Instructor, Laura Stanley Personal Jeweler

As jewelry professionals, especially as highly trained appraisers, we pride ourselves on our skills, but when was the last time you took a step back and evaluated your methods? An appraisal is only as good as the accuracy and specificity of its information. Especially when identifying a piece of jewelry or recreating a lost item, the details of an appraisal can be more important than an assigned value.

Creating a consistent inspection/reporting process is the key to a proper evaluation. Some appraisers have worksheets for each piece to ensure they're not missing any details. If you'd like to see what this looks like, contact us. We can share some templates.

The steps for appraising a customer's item or preparing insurance replacement documents on an item you sold are the same. Remember that no matter what type of final report you produce (replacement, estate, etc.), getting the basic details of an item is always step one. Then, you can research and price in the appropriate markets to finish the report.

Retailers often leave out information on items they sell (style number, designer, etc.) in the hope that the insurance company will have to come back to them to replace the item. This is just not the case; you're doing your clients a disservice by leaving it out.

Basic items of information you should collect include:

- **Item Type**: Ring, earrings, necklace, etc. Leave off gender terms such as "Gent's" or "Lady's" when describing the item. Functional adjectives such as "engagement," "wedding," or "anniversary" should be avoided too. While they might be trade terms we have grown accustomed to, a "Past, Present, and Future Anniversary" ring is just a three-stone ring.
- **Metal Type**: Are you going off the markings? Did you do an acid test or electric testing?
- **Manufacturing Technique**: Is the item cast? Die-struck? This can make a difference in the value. Die-striking is a more costly method and usually creates a more well-built piece of jewelry. When it comes time to find comparables, it is important to know so you can look at the same type of items.
- **Item Weight**: While this seems straightforward, you would be surprised how often it gets missed. Grams or pennyweights are both perfectly acceptable. Weigh it!
- **Trademarks and Hallmarks**: Even if you don't know what it is, you should try to describe it in words if possible. If you can, a photo of it can be even more helpful.
- **Overall Condition**: Some people include a statement in their cover letter explaining that "normal wear" is expected unless otherwise stated. No matter what you opt for, it should be consistent and included in every report. Abraded facets, worn prongs, stretched watch bands, and broken diamonds all matter.
- **Dimensions and Size Details**: Finger size is often overlooked, but it can be a helpful detail to include. Unless you have a point of reference, pictures don't show what the dimensions are. Chain lengths, shank widths, shoulder heights, etc., are important.
- **Age**: Is this a modern, vintage, or antique item? If you have information about the age, please note it.
- **Textures/Finishes**: Hammered, high polish, Florentine, etc.

Appraisals need to look professional and attractive, but a fluffy, flashy appraisal devoid of meaningful information does your client a disservice. The finished document represents you, your professionalism, and the American Gem Society (AGS). That goes for the entire document, especially the descriptions of jewelry. As outlined in the American Gem Society Membership Manual (p. 44), one of the responsibilities of an appraiser is to “Supply complete and accurate information based on scientifically correct testing methods, careful analysis, and knowledge of current market values.” It’s strongly recommended that each titleholder takes some time to review the standards in their entirety and see if their current reports meet the current AGS standards.

What is “complete and accurate information?” There’s no simple one-size-fits-all answer. Obviously, the detail you provide on an 8mm round diamond should be significantly more than on an 8mm round amethyst.

While we all want our appraisals to be as detailed as possible, time management is also important. It’s important not to overcomplicate the process and waste time.

Let’s look at the AGS Membership Manual, Diamond Grading Manual, and AGS Way Diamond Grading Worksheet. We can get an idea of what should be in a description of a diamond and diamond jewelry.

Color, Clarity, and Carat Weight are obvious and don’t need too much clarification. We must remind you that single diamonds should get a single color and clarity grade. Do not split-grade a single stone, even one that is mounted.

It is the detail of the Cut of a diamond that we often see missing on reports. With Cut accounting for such a large percentage of the value of a diamond, it’s most important to include more details.

- **Girdle**: Thickness, polished or faceted? Bruted? Are there naturals visible?
- **Culet**: Is it pointed? Faceted? Abraded?
- **Symmetry**: List the grade, and it can often be helpful to list what caused the grade, such as pointing alignment, misshapen, and/or extra facets.
- **Polish**: When does a polish-graded nick become a clarity-graded chip? Is the girdle rough? Are facet junctions abraded?
- **UV Fluorescence**: Medium, strong, very strong? Remember, “Faint” or “None” is combined and listed in AGS terms as “Negligible.”
- **Plotting**: Plotting serves three very important purposes when appraising a diamond. First, it helps identify the diamond. Secondly, it establishes the condition at the time of grading. And lastly, it can support the grade that you have assigned. It’s strongly suggested that diamonds 1ct and over be plotted. If the diamond already has a grading report with a plot from a laboratory, it would be worth noting if you agree with the plot. If something is noticeably different, you should note that in your report and on a plot. With the rise in appraisal software usage and plot integration options, it can take much less time than it used to. Adding plots to your reports, even more so for smaller diamonds (between .50ct–1.00ct), can add a level of professionalism to your reports.

By accurately describing the diamond, it can help find more accurate comparable items for a modal average. A search of just the basic 4Cs on RapNet, Polygon, or other databases can return maybe 100 “comparable” items. However, when you add in fluorescence, girdle thickness, and other details, you can narrow that list down to more specific “comparable” items.

The level of detail in your reports helps set you apart from your competition—who provides less than thorough reports—and helps support the value conclusions you’ve reached. It might take a little longer for each report to be completed, but it helps protect your customers.

Key Takeaways

1. To ensure appraisal accuracy, a consistent inspection and reporting process is important. Standard worksheets or templates can help appraisers avoid missing crucial details, thus increasing the validity of their assessments.
2. Information that should be collected during the appraisal process includes the type of item, metal and manufacturing details, physical characteristics like weight and dimensions, age, textures, and finished appearance.
3. It is important to provide a professional-looking document that contains meaningful, accurate, and complete information. The appraisal represents the appraiser and their professionalism. Fluffy or overly decorative reports that lack substantial information do a disservice to the client.

4. When assessing diamonds, include detailed descriptions of cut characteristics such as the girdle, culet, symmetry, polish, and UV fluorescence. These details help accurately establish value based on current market conditions and better comparable items when researching market prices.

5. While thoroughness is crucial, it is important to be aware of efficient time management in the appraisal process. Accurate yet concise reporting should be the goal to balance detail with practical appraisal workload management.

APPRAISING AND DISCLOSING LAB-GROWN DIAMONDS

Joel Hassler, CGA, CGA Instructor, Von Hasle Jewelers

One of the more common topics I continue to get questions about is appraising lab-grown diamonds. *Do I need to put a disclaimer that the price will go down? How do I appraise a lab-grown diamond? I've heard insurance companies won't insure lab-grown diamonds anymore because the price keeps dropping. Is that true?*

You apply the same processes and methodology to appraising lab-grown diamonds as with any other jewelry piece. An appraisal has a defined purpose (Why are we doing the appraisal?) and intended use (What is the appraisal being used for?). An appraisal also should contain an effective date of value. Retail jewelers rarely encounter an appraisal assignment that would require them to hypothesize the value of an item at a future date. An assignment like this would require some additional training.

Simply put, an appraisal report is an appraiser's opinion of value for a defined purpose, for a stated intended use, on a stated effective date. No statement is required, nor should one be included, about any potential decrease (or increase) in the value of an item in the future. We see constant changes, up and down, in the price of precious metals and gemstones, but no disclaimer is needed there, either.

One of the hardest things for a retail jeweler to do when appraising an item is to remain completely unbiased and remember which hat they're wearing when acting as an appraiser. The appraiser's responsibility is to the appraisal assignment, not to protect the client. It can be easy to slip from the role of appraiser to advocate or adviser.

The identification of lab-grown diamonds can prove tricky as well. You must ask yourself if you are competent to identify and value them. Do you have appropriate equipment, such as a reliable diamond verification instrument? Do you have any further training using cross-polarized filters or UV for identification clues? As an appraiser, you are responsible and liable for the conclusions stated in your report. While it is common to use a disclaimer and state the critical assumption that all of the diamonds are assumed to be natural, that is not necessarily the best practice or the most professional path to take. The diamond verification instrument that you have as part of your gem lab should be included in your equipment list in your report, along with any steps you took to reach the conclusion you made. Did you screen every diamond? Did you only screen diamonds over a certain size? Did you rely on a grading report from a major lab for data? Whatever steps you did take should be included in your report.

Prices for lab-grown diamonds continue to vary widely. That can make it more complicated to arrive at a value, especially if you are using a cost approach and applying a markup. The initial conversation that you have with your client is important. Do they have any previous paperwork, such as purchase receipts, previous appraisals, or insurance documents? Where was the item originally purchased? Was it purchased online? At a national chain store? At an independent retailer? These questions can help you determine the most appropriate marketplace to research.

We have clearly seen the replacement value of lab-grown diamonds decrease over the last decade. This can lead to an uncomfortable conversation with your appraisal client when preparing a new appraisal report on a diamond bought when prices were higher; it is particularly difficult if you were the original seller. Practicing your bedside manner when delivering the report and being able to confidently discuss your value conclusions is important.

It is unlikely that insurance companies will stop writing policies on lab-grown diamonds. They have insured lab-grown gemstones for decades or even centuries, along with insuring many lower-valued items as well. Most policies are written as actual cash value (ACV), and the replacement values are determined at the time of loss. If the replacement value of lab-grown diamonds continues to decline, they may over-insure their items. It might be beneficial for you and your clients to recommend they have the values of their lab-grown diamonds updated on a more frequent basis compared to their other jewelry.

Key Takeaways

1. On an appraisal, no statement is required, nor should one be included, about any potential decrease (or increase) in the value of an item in the future. An appraisal report is an appraiser's opinion of value for a defined purpose, for a stated intended use, on a stated effective date.

2. An appraisal for lab-grown diamonds should follow the same processes and methodologies as any other piece of jewelry, with a defined purpose, intended use, and effective date of value.

3. Appraisers should remain unbiased in their valuation and focus on the appraisal assignment rather than protecting the client's interests.

4. Appraisers should have the necessary equipment and expertise to identify and value lab-grown diamonds accurately. This includes using diamond verification instruments and following proper identification procedures.

COLORED GEM GRADING AND PRICING WORKSHOP

Richard Drucker, Gemworld International

We all know the importance and difficulty of grading colored gemstones and the need for consistent grading in an area that is so subjective. Not only is grading far more complex than diamonds with all the visible colors, but clarity and cut are also more subjective, with more to consider.

There are many color grading systems available today. They all have pros and cons and may not be comparable to each other. However, using one helps retain consistency in grading over time with practice. Any system, such as “World of Color,” is good and in the absence of using a system, one must rely on experience.

Color is the most important component of grading (which may also be enhanced by good cutting). Determine the starting grade on a 1-10 scale, with 10 being the highest. This ranking system will be the key to consistent valuation, comparing the overall grade on a relative scale. For our purposes, we define the scale as Commercial (1-4), Good (5-6), Fine (7-8), and Extra Fine (9-10).

Clarity in our grading system is more than inclusions. The texture (transparency) and color zoning are also crucial factors. A gem that has a hazy appearance and lacks transparency is often due to inclusions. Zoning is the unintentional zoning that may be seen in some gems. For example, a sapphire may have an area that is lighter blue or even colorless against the darker blue within the stone. Sometimes, the zoning is visible only face down, which is not as bad as when it is visible face-up. The grading scale for colored gems that we use is Free of Inclusions, Lightly Included, Moderately Included, Highly Included, and Excessively Included. The grade is determined with 10x magnification. Texture is the visual effect of reducing transparency, graded as Transparent, Faint, Moderate, Strong, and Prominent (opaque). There are always exceptions to every rule, especially with colored gems. For example, some might be considered favorably, such as in the case of a Kashmir sapphire. Likewise, with a demantoid garnet, a horsetail inclusion is a positive, not a negative.

Although cut has the most factors to consider, with practice, grading can be very quick. This is because a quick look through a loupe can tell a lot when holding the gem between tweezers and looking at the profile, top, and side views. Since we do not measure the table, all the facets and angles, etc., as we would with a diamond, the visual appearance tells it all, and we grade these items all as acceptable or unacceptable.

We are also judging the light performance of the gem with a visual estimate of the brilliance. Brilliance is the return of light from the pavilion facets, seen as color. To get 100% light return is rare as most gems also have some windowing and/or extinction. Windowing is seen where there is a “read-through” effect with little or no color, and extinction is the dark areas where the color goes toward black. While this might be unfamiliar terminology to the reader, with practice, one can assess an estimate by percentage of how much of the surface is returning color or brilliance to the eye. A brilliance range of 75-100% is deemed acceptable for no deductions.

The other components of cut to consider as acceptable or not acceptable are Crown Height, Pavilion Depth, Bulge, Girdle, Table Size, and Face-up and Profile Symmetry. Finally, assess the finish of the gem, noting the polish as Excellent, Very Good, Good, Fair, or Poor. As we are not as critical with colored gemstones, Good or higher is acceptable, but certainly, an exquisite polish from a top cutter is worth something extra.

The use of worksheets is helpful in determining a starting grade. Each of the components that follow for clarity and cut as described here are then evaluated, and when necessary, deductions are taken to arrive at an overall grade. The purpose of the exercise is to gain confidence and consistency. It is important to trust your gut feeling. Look at the overall quality of the gem. Determine a grade on the 1-10 scale for the overall quality. The gem may look like the color is an 8 but you notice a few areas where there is extinction, or maybe some eye visible inclusions, or an off-centered culet. The grade of 8 now has become an overall grade of 6 or 6.5. Then, do the full exercise grading all the components and compare that to the initial gut grade estimate. If they are close, you are on your way to successful grading and pricing. Remember that color grading is subjective—there is no one single exact grade. Your experience will guide you.

Key Takeaways

- Colored gemstone grading and pricing is more complex and subjective, but using a system along with your experience will sharpen your skills to reduce subjectivity.
- Unlike diamonds, there are more components to consider when grading colored gemstones, but grading is more lenient without the need for exact measuring devices and can be accomplished in just a few minutes with practice.
- Brilliance, windowing, and extinction are difficult concepts to grasp but the key component here is brilliance—the return of light from the pavilion facets. Often, it is the cutter that can maximize the brilliance, but the material itself may not have consistent color throughout. Brilliance is the key to getting the highest grade and price when the color is the best.


DIAMOND CLARITY: ESSENTIAL GRADING AND PLOTTING FOR RETAIL JEWELERS AND APPRAISERS

Randall Lightfoot, CG, Mayflower Estate Buyers & Consulting, and Wade Abel, CG, American Gem Society

As early as the 1500s, diamond clarity was understood as a value factor. However, it was not until the 1940s that Robert M. Shipley developed and taught the 4Cs, a way to remember and refer to a diamond's four quality factors: cut, color, clarity, and carat weight.

When determining a diamond's clarity, it is vital to understand how to properly identify what contributes to the clarity grade, as this will effectively determine how you then plot the diamond.

A consistent methodology is necessary when clarity-grading a diamond. Before beginning, clean the diamond with a cleaning cloth to remove any debris that might be mistaken as a clarity characteristic.

Next, you want to gain an initial impression of the clarity grade and characteristics at 10x magnification. While getting your initial impression, identify a reference point, usually an easily identifiable characteristic. This point will also be helpful for reorientation during the plotting process if necessary. It can be used as a reference for the location of other clarity characteristics on the plot.

Hold the diamond table-to-culet and slowly rotate and tilt the diamond to assess its characteristics. This should be done section by section. Each section consists of the pavilion main facet with its adjacent lower-half facets, and past the girdle, the crown bezel facet with its adjacent upper-half facets. If we consider a standard round brilliant cut diamond, there are eight pavilion main facets. Therefore, there are eight sections.

Once you begin plotting, start at the reference point you identified during your initial impression. Hold the diamond table-to-culet and examine it by adjusting the focus in and out while tilting the diamond as you rotate through sections. Avoid rushing this assessment, as this could cause you to miss relevant clarity characteristics.

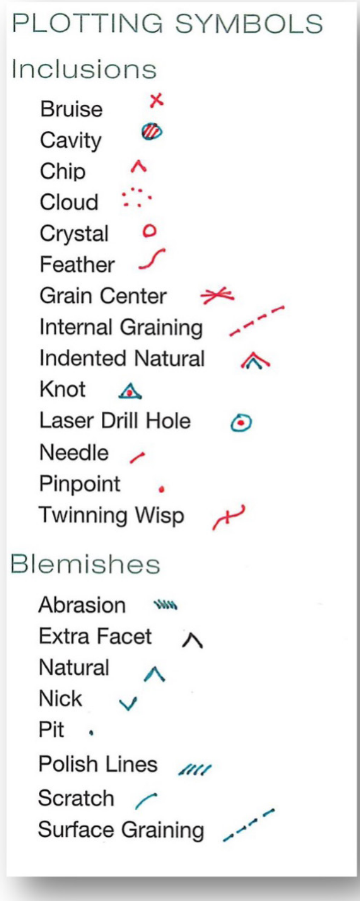
Once you have completed your assessment of all sections, hold the diamond table-up in the microscope again, focusing from the crown facets down to the pavilion facets. Plot any additional characteristics that should be plotted on the table facet of the plot diagram.

Your final clarity determination will be made by viewing the diamond with a 10x loupe girdle-to-girdle under the overhead light. The diamond should be examined with a 10x loupe from four different rotations because the visibility of characteristics' relief may vary with different views. Caution should be taken not to loupe the diamond for too long as your first impression may be a more appropriate clarity determination.

As mentioned, it is best practice to clean the diamond before assessing the diamond and even while you evaluate each section. This can be achieved by using an ultrasonic cleaner and a diamond cloth along with a pointer probe to remove stubborn material. While grading the diamond you can "wet-grade" the diamond, which involves the use of a sponge-tipped tool to wipe away dust and other material as you evaluate each section. Water with a very small amount of soap can be used, but isopropyl alcohol can also be effective.

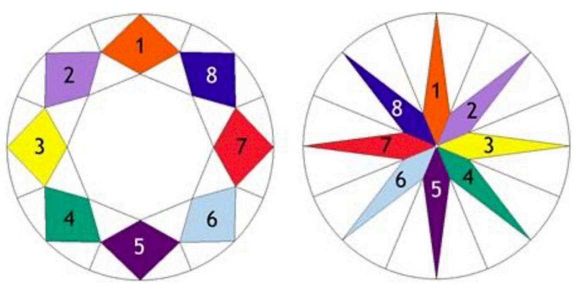
Clarity grading includes five factors: nature, number, size, relief, and location of the characteristics. When assessing each section of the diamond and during your initial and final impressions, these factors should be considered.

So, what about the plot? The intention of a plot is to identify the diamond and justify its clarity grade, as the clarity grade will, in part, set the diamond's value. A diamond grading plot is also used to communicate to the client about their diamond and its condition (e.g., chips or other damage/wear and tear characteristics).



Plotting Tips

- Plot the characteristic where it is located, and only once. Due to diamond's optical properties, there will be reflections of the characteristic. Although these reflections may factor in the final clarity grade, they should not be plotted.
- Use consistent and industry-recognized plotting symbols and colors. Additionally, provide a Key to Symbols—a legend for the characteristics represented on the plot—for easier communication.
- Orient the plot using fold symmetry. The characteristics should be plotted as if the paper plot were folded so that the corresponding pavilion mains and crown bezels would meet.



- Plot characteristics with relative size, shape, and location to each other and the plot diagram.
- Only plot characteristics on the pavilion diagram that break the pavilion surface or are only visible from the pavilion view (usually for higher clarity diamonds).
- Plot to sufficiently justify the grade and identify the diamond. Over-plotting can become time-consuming, and under-plotting can create confusion when communicating about the diamond's clarity grade or identity.

Key Takeaways

1. A consistent methodology is crucial when clarity-grading a diamond. It is important to clean the diamond before assessment to avoid mistaking debris as clarity characteristics. Identifying a reference point during the initial impression helps in plotting the diamond accurately..
2. When assessing a diamond for clarity, the process should be done section by section by slowly rotating and tilting the diamond to identify its characteristics. A standard round brilliant cut diamond has eight pavilion main facets, meaning there are eight sections to consider.
3. Final clarity determination involves viewing the diamond with a 10x loupe girdle-to-girdle under the overhead light. Different views may reveal varying levels of relief for the characteristics, so it is advisable to view the diamond in four directions for a more accurate assessment.
4. Plotting the diamond's characteristics helps justify its clarity grade and communicates important information about the diamond to clients. It is essential to plot characteristics accurately using consistent symbols and colors, aligning with fold symmetry, and avoiding over- or under-plotting to prevent confusion.