

## XYZ Dealer-to-Customer Standards – Sales:

Every XYZ customer will receive a warm, sincere, enthusiastic and timely greeting.

### Measurement:

- Question 1a: *Thinking about your XYZ Salesperson, please indicate your level of satisfaction with: The way you were greeted.*

### Customer Objectives:

- Establish rapport
- Find help

### Sales Objectives:

- Create an immediate good impression
- Establish rapport
- Welcome the client to the dealership

### Professional Image:

- Appearance and dress
- Sincerity
- Ease of doing business with the Salesperson
- Honest in dealing with the Salesperson
- Keep your office neat and inviting

### Basic Steps:

- 1) Greet the customer promptly:
  - Treat your customers like guests
  - Treat all customers in a courteous, fair and professional manner at all times – make a positive first impression
  - Make eye contact immediately and maintain positive eye contact
  - Smile sincerely, always talk positively, no negative comments
  - Say, “Welcome to \_\_\_\_\_ XYZ, how are you today?”
  - Offer to shake hands
  - Introduce yourself by name and offer a business card (so the customer can remember your name)
  - Ask for the customer’s name and ask how the customer wishes to be addressed
- 2) Use open-ended questions to determine why the customer has come into the dealership
- 3) Offer to introduce the customer to whomever he/she asks for
- 4) Ask the customer if he/she would like some refreshments
- 5) Make a smooth transition to a sit-down consultative interview

**Best Practices:****Dealership Management:**

- Increase the level of management supervision and performance tracking on this Standard.

**Receptionist:**

- Move receptionist's station to main showroom entrance, with a view of the lot.
- Receptionist should monitor lot and page a Salesperson in cases where customers were not approached quickly.
- Consider instituting a "*greeting desk*" or "*hostess system*," whereby all new customers are always seen first by individuals assigned specifically to greeting them and creating a comfortable sales atmosphere; customers are then advised that a Salesperson is available on request.
- Receptionist should maintain a floor and phone traffic log for both customers and Salespeople.

**Dealership Facilities:**

- Install clear signage for customer parking area, preferably directly in front of the showroom.
- Signage should direct customers toward the showroom area.
- Keep customer parking area clear of all other vehicles.
- Consider purchasing a golf cart to shuttle customers to the parking/sales lots (if applicable).

**Salespeople:**

- "*Smile*" – you are always on stage.
- Utilize an open floor system.
- Continually emphasize the importance of a prompt greeting in accord with this Standard.
- At least one Salesperson should have an eye on the lot at all times.
- Develop a device to identify those customers who have been greeted, but have elected to browse the lot.
  - ⇒ Before letting them browse, inform the customer of current promotions.
  - ⇒ Periodically check back to see if they need assistance.
- Designate one Salesperson to handle the floor during sales meetings.
- Post Salespeople in strategic positions on the lot to assure that customers do not go unseen.
- Answer all dealership phone calls promptly and professionally.
- Establish a three-team sales force; schedule two teams for Saturday and Sunday.
- Review SSI scores with Salespeople.
- All Salespeople are reminded that achieving this Standard is a priority.

**Other Dealership Personnel:**

- Add a General Manager to the staff (if one does not already exist); their duties include management and supervision as well as direct contact with customers.
- Establish cross-functional responsibility for greeting: If a Porter, Service Advisor, or any other employee sees an unattended new customer, it should be their responsibility to greet that customer and politely guide them toward a Salesperson; this process should require direct management involvement, including the Dealer, when necessary.

**Benefits:**

- Makes the customer feel “*welcome*” in your dealership.
- Sends a strong “*we care*” message to the customer.
- Establishes two-way communication.
- Focuses on the relationship.
- Empowers the people closest to the customer.
- Ensures consistent communication.
- Enhances the brand image of XYZ.

**XYZ Resource Materials:**

- Please refer to the grid located on page 23 of this document.

We will offer all customers a thorough product presentation and demonstration ride that will help them to fully understand the features, benefits and value of XYZ vehicles.

Measurement:

- Question 1f: *Thinking about your XYZ Salesperson, please indicate your level of satisfaction with: Making the test drive a positive experience.*

Customer Objectives:

- Determine value of product
- Confirm decision about dealership and Salesperson
- Determine product meets needs and satisfies buying motives
- Gain specific information about XYZ products and competitors
- “Touch and feel” the car, driving it before buying
- Develop trust and assurance in Salesperson

Sales Objectives:

- Match needs with appropriate XYZ vehicle
- Share information about the XYZ vehicle
- Build emotion around product
- Reinforce customer’s perception of Salesperson as a professional
- Demonstrate features and performance of car
- Build customer desire to drive the car

Professional Image:

- Product expert – regarding XYZ vehicles and the competition
- Ease of doing business with the Salesperson
- Honesty in dealing with the Salesperson

Basic Steps:

- 1) Salesperson asks open-ended questions to find out which XYZ vehicle best meets the customer’s needs and desires:
  - Thoroughly interview customers to determine their vehicle needs.
- 2) Salesperson presents the vehicle:
  - Explain to the customer the features, benefits and advantages of the model they have selected.
  - Highlight its competitive strengths.
- 3) Salesperson extends an invitation to take a demonstration drive of the vehicle.
  - Salesperson always accompanies the customer on the demo drive.
- 4) Salesperson ensures that the vehicle is available and ready for a demo drive.
- 5) Salesperson obtains customer information.
- 6) Salesperson provides a thorough demonstration drive:
  - Explain how key controls function.
  - Allow customer to experience vehicle first hand.
  - Salesperson has a predetermined demonstration course; the Salesperson drives the first half, then the customer drives back to the dealership.

### Best Practices:

#### **Dealership Facilities:**

- Establish a system for monitoring demonstration drive activities:
  - ⇒ Keep demonstration models in perfect operating condition.
  - ⇒ Have vehicles readily available so the sales staff can quickly and efficiently find the appropriate vehicle.
  - ⇒ Have a procedure for gathering customer information *prior* to the demonstration drive (e.g., copying their driver's license).

#### **Dealership Management:**

- Ensure all Sales staff members are knowledgeable about XYZ products and the competition:
  - ⇒ Schedule sales meetings to focus on product knowledge.
  - ⇒ Conduct product knowledge meetings specifically for newly hired Salespeople.
  - ⇒ Require sales certification prior to presenting to customers.
  - ⇒ Recognize and reward Salespeople when they receive their certification.
  - ⇒ Schedule salespeople for all available XYZ Sales Training.
  - ⇒ All training meetings should be a learning experience.
  - ⇒ Conduct on-going "*Dare to Compare*" competitive model training.

#### **Salespeople:**

- All Sales staff members should be knowledgeable about XYZ products and the competition.
- Identify the customer's primary buying motivations ("*hot buttons*") to tailor the vehicle selection and presentation process.
- Salespeople should prepare a list of questions to ask customers to help guide the vehicle selection process and put the customer at ease:
  - ⇒ "What type of vehicle are you driving now?"
  - ⇒ "What do you like about it?"
  - ⇒ "Are you looking for a two-door or a four-door?"
- Find out what other vehicles the customer is considering:
  - ⇒ Never "*put down*" the competition; rather, point out the features and benefits that make the XYZ a better choice.
- Utilize all sales training materials provided by XYZ, including **Product Comparison Guide**, **Pocket Guide**, **Sales Link**, etc.
- Conduct a five-point product presentation:
  1. **Driver's side:** Start with the customer in the driver's seat (review the controls, audio system, climate controls, glovebox and other storage).
  2. **Front:** Open the hood and talk about the engine and the location of customer maintenance items; point out suspension, drivetrain, wheels, tires, brakes.
  3. **Interior:** Explain interior roominess, childproof door locks, fold-down seatbacks, comfort and convenience features.
  4. **Rear:** Show trunk/cargo capacity, discuss versatility.
  5. **Window label:** Review information listed on the Monroney Label, including standard equipment, options and EPA fuel economy.

- Thoroughly understand the customer's vehicle needs so the Salesperson can select the right demonstration vehicle.
  - ⇒ Salesperson should listen carefully to the customer and repeat important points to demonstrate that they understand.
- Give the customer "options":
  - ⇒ Explain the different options and dealer-installed accessories that are available so they can properly equip the vehicle.
- Explain XYZ's 3-year/50,000-mile warranty and roadside assistance coverage (if applicable).
- Demonstrate the value provided by your dealership:
  - ⇒ Discuss shuttle service, loaner cars, qualified technicians, service hours, etc. (as applicable)
- Prepare demonstration routes and vehicles:
  - ⇒ Prepare in advance two or three driving routes that feature different driving conditions.
  - ⇒ Select an appropriate route that meets the customer's needs.
  - ⇒ Keep demonstration vehicles fueled, clean and in perfect operating condition.
- Take the customer on a demonstration drive *before* entering into a discussion on price.
  - ⇒ The excitement generated by the demonstration drive builds value in the eyes of the customer
- Show courtesy by opening the door for the customer.
- Begin the demonstration drive in the driver's seat – this gives the Salesperson an opportunity to demonstrate how the controls operate... then let the customer drive.
- Confirm the customer's satisfaction with the vehicle.
  - ⇒ If they are not satisfied, find out why... then find a vehicle that better fits their needs.
- Return to the showroom to continue working with the customer.

### **Benefits:**

- Sends a strong "we care" message to the customer.
- Continues two-way communication.
- Focuses on the relationship.
- Empowers the people closest to the customer.
- Ensures consistent communication.

### **XYZ Resource Materials:**

- Please refer to the grid located on page 23 of this document.

We will provide an atmosphere that enables our customers to make an informed purchase decision in a comfortable, honest, “hassle-free” environment.

### Measurement:

- Question 1d: *Thinking about your XYZ Salesperson, please indicate your level of satisfaction with: Ease of doing business with your Salesperson.*

### Customer Objectives:

- Gain information
- Express their individual needs
- Feel comfortable with your dealership
- Build rapport and trust
- Select the vehicle that's best for them

### Sales Objectives:

- Discover the client's needs
- Demonstrate concern
- Help the process move forward smoothly
- Build credibility
- Create a client-focused process
- Close the sale

### Professional Image:

- Build trust – this is the beginning of a relationship
- Salesperson treats the customer as a “*client*,” not just a “*buyer*”
- Honesty in dealing with the Salesperson

### Basic Steps:

- 1) Confirm the customer's vehicle choice:
  - Present all options and accessories before discussing price.
- 2) Provide an overview of the sales and delivery process so the customer knows what to expect.
- 3) If a trade-in is involved, have an appraisal completed on the vehicle.
- 4) Work with the customer to determine the best purchase option and pricing to meet the customer's needs.

### Best Practices:

#### **Dealership Facilities:**

- Establish an environment that promotes comfortable, honest, hassle-free customer negotiations.
  - ⇒ The focus should be on customer comfort.
  - ⇒ Explain your “*Hassle-Free*” Dealership sales policy to customers when they enter the showroom.
  - ⇒ Clean and upgrade the entire lot area.
  - ⇒ Repair, repaint and resurface dealership exterior and interior, as needed.

### Dealership Management:

- Establish a policy regarding the role of the Salesperson, management and F&I personnel.
  - ⇒ Explain to the customer why the dealership uses “*turnovers*” – e.g., more efficient, better explanations, etc.
- Develop a policy which prevents “*price shoppers*” from being either rushed or disregarded as qualified customers.
  - ⇒ Re-educate and orient Salespeople on methods for providing direct responses to price-related questions.
- Establish and enforce a traffic control system, including a policy for minimum time spent with each customer.
  - ⇒ Salespeople would be required to log customer contact time along with other information for Sales Manager review.

### Salespeople:

- The interview is the heart of the consultative sales process – it helps you learn the customer’s wants and needs. Then, you’re better able to:
  - ⇒ Build rapport.
  - ⇒ Build trust.
  - ⇒ Determine what’s important to the customer.
  - ⇒ Build the value of your dealership and of XYZ.
  - ⇒ Create an opportunity for the customer to sell themselves.
- This should be done in a sales office, if possible:
  - ⇒ Ensure private uninterrupted consultation.
  - ⇒ Offer refreshments.
  - ⇒ Let the customer set the pace of the sale – don’t be “*pushy*”.
- Hold a conversation:
  - ⇒ Take notes and be a great observer and listener.
  - ⇒ Try to understand the customer’s needs and priorities.
- Don’t attempt to sell until you’ve gotten all the information you need to do a good job.
- Explain the features, advantages and benefits of the product.
  - ⇒ Explain the differences in trim levels and available options so the customer can make an informed purchase decision (this is your last chance to build value before discussing price).
  - ⇒ Builds value – gives the customer more reasons to purchase from your dealership.
- Answer all customer questions.
- “*Shoppers*” will at all times be considered “*buyers*” until such time it is known that they have purchased from another dealership.
  - ⇒ “*Be-backs*” will be considered legitimate, qualified buyers, and treated as such by all Salespeople.
  - ⇒ Set up a system to contact customers who do not purchase within 48 hours to thank them for visiting the dealership and schedule a follow-up dealership visit.



- Confirm with the customer that they have selected the right vehicle to meet their needs.
  - ⇒ Make sure they have narrowed down their choices before talking price.
  - ⇒ If the exact vehicle the customer wants is not available, explain how you will locate the vehicle along with an estimated arrival date.
- Review the Monroney label with the customer, pointing out standard and optional equipment, MSRP, and option package savings (if applicable).
  - ⇒ Use the XYZ accessory brochure to present available accessories.
  - ⇒ Keep up to date on special financing, lease finance details, current incentives and dealership promotions so you can present that information to the customer with confidence.
- Provide a professional presentation and point out all of the benefits, but...
  - ⇒ Don't pressure the customer to finance through the dealership.
  - ⇒ Don't pressure the customer to buy an extended service plan.
  - ⇒ Don't pressure the customer to buy aftermarket products.
- Be aware that the negotiation stage can be very stressful for your customer.
  - ⇒ Take your time to thoroughly explain the process so the customer can feel more comfortable.
- Use the XYZ Sales Worksheet to record all pricing and vehicle information to prevent confusion and get the customer comfortable with the buying process.

**Benefits:**

- Reinforces the "we care" message to the customer.
- Continues two-way communication.
- Focuses on the relationship.
- Empowers the people closest to the customer.
- Ensures consistent communication.

**XYZ Resource Materials:**

- Product brochures, accessory brochure, Monroney label
- Dealership worksheet, current dealership incentive and finance lists
- Please refer to the grid located on page 23 of this document.

All XYZ customers will receive a thorough, professional delivery of their new vehicle.

Measurement:

- Question 7e: *At the time of delivery, did someone at the dealership: Use a Delivery Checklist when delivering your new XYZ?*

Customer Objectives:

- Understand primary operating systems
- Meet service personnel
- Receive vehicle when promised
- Receive a vehicle in “showroom condition”
- Understand warranty coverage
- All dealership accessories installed

Sales Objectives:

- Create a major emotional moment for the customer
- Ensures that customer understands the key controls and features of the vehicle
- Assures that customer understands dealer’s service operations
- Builds customer loyalty
- Bonds customer to dealership

Professional Image:

- Organized – vehicle is ready when it’s supposed to be
- Ease of doing business with the Salesperson and the dealership
- Demonstrates respect for customer’s time and commitment to buy a XYZ

Basic Steps:

- 1) Salesperson schedules delivery appointment.
  - Salesperson starts the paperwork on the **Delivery Checklist**.
- 2) Salesperson checks vehicle *prior* to delivery to ensure it is in showroom condition.
  - Perform a final inspection of the vehicle from the customer’s point of view.
  - If there are any problems, have them corrected.
- 3) Salesperson escorts customer to designated delivery area.
  - Dealership will have an area set aside for the delivery of new vehicles.
- 4) Salesperson explains warranty, reviews owner’s manual.
- 5) Salesperson explains operation of key features.
- 6) Salesperson takes customer to the Service and Parts Departments.
  - Introduce customer to key Service and Parts Department personnel; provide business cards for key service personnel.
- 7) Salesperson reviews **Delivery Checklist** with customer.
  - Obtains customer’s signature on checklist.
  - Give customer a copy of the *Delivery Checklist*.
- 8) Dealership personnel make it a “*special event*” for the customer.
  - Include various dealership employees, including management.

## Best Practices:

### **Dealership Facilities:**

- Identify and maintain a clean and inviting delivery area:
  - ⇒ If you do not have a special delivery area, establish a designated space for deliveries.
  - ⇒ The delivery area should be visible from the showroom so other customers can share in the excitement of the delivery.
  - ⇒ The delivery area should be protected from the weather.
  - ⇒ Make sure the delivery area is well-lit, clean and neat at all times (so you're ready for spot deliveries).
  - ⇒ Identify the area with banners and signage.
  - ⇒ The delivery area should be easily accessible, so the customer may drive the vehicle away with ease at the end of the delivery.

### **Dealership Management:**

- Adopt a policy of utilizing a ***Delivery Checklist*** during the delivery process for all customers.
  - ⇒ Make sure all Salespeople use the *Delivery Checklist* with their customers.
  - ⇒ Consider rewarding the Salesperson when you receive a signed *Delivery Checklist*.
- Develop a pamphlet that explains your dealership's Service and Parts system. Include:
  - ⇒ Business hours.
  - ⇒ Special services (e.g., shuttle service, loaner cars, etc.).
  - ⇒ Appointment policies and procedures.
  - ⇒ Department specialties.
  - ⇒ Early bird drop-off.
- Provide thanks from top dealership management to make the delivery a special event and offer future assistance.
  - ⇒ The General Manager, Sales Manager or Dealer should personally congratulate the new XYZ owner during delivery.
  - ⇒ Offer the customer a business card, as well as assistance in the future.
  - ⇒ Ask the customer to refer friends and relatives to your dealership.
- Make it a celebration -- particularly on high-traffic days when several deliveries are scheduled.
- Present a gift -- no matter how small.
  - ⇒ The gift should be inscribed with the dealership logo.

### **Salespeople:**

- Offer the new owner refreshments.
- Use the *Delivery Checklist* during the vehicle presentation.
  - ⇒ Following the format on the *checklist* when working with the customer ensures you do a thorough job.
  - ⇒ Explain the role of the *Delivery Checklist* to your customer *prior* to their signing it.
- Demonstrate that the vehicle is in showroom condition and explain the operation of the key controls.
  - ⇒ Walk around the vehicle with the customer and demonstrate that the exterior and interior are clean and damage-free.
  - ⇒ Show the location of the windshield washer reservoir, oil dipstick, spare tire and jack.

- ⇒ Have the customer sit in the driver's seat -- explain the basic operation of the vehicle from the passenger's seat and offer a test drive.
- ⇒ Make sure you thoroughly explain and demonstrate the audio system, climate control system, and the steering lock and release mechanism.
- ⇒ Confirm that your customer approves the condition of the vehicle and that he or she understands all the features and functions of their new XYZ.
- ⇒ A thorough product presentation helps prevent future product complaints because customer understands how vehicle operates.
- Explain the contents of the Owner Portfolio, including warranty coverage and the maintenance schedule.
  - ⇒ Show the customer that the Owner Portfolio contains the vehicle Owner's Manual, XYZ Warranty Information, extra key, Card Key, business cards of dealership personnel, etc.
  - ⇒ Use the "Contents Page" to explain the major components of the Owner's Manual.
  - ⇒ Use the "Scheduled Maintenance Chart" in the Owner's Manual to explain the maintenance items suggested for every 7,500-mile service under normal driving conditions.
  - ⇒ Using the "Warranty Coverage at a Glance" section of the Warranty Information Booklet to explain XYZ's 3-year/50,000-mile warranty coverage.
  - ⇒ Explain "what is not covered" under the warranty, using the appropriate page in the Warranty Information Booklet.
- Before you finish the delivery, be sure you neatly place all of the documentation presented to your customer back into the vehicle.
- Introduce your customer to Service and Parts Department personnel and explain the dealership's system for service visits.
  - ⇒ Explain the Service hours and procedures for making a service appointment.
  - ⇒ Take your customer on a dealership tour that includes the Service and Parts Departments.
  - ⇒ Introduce your customer to key personnel, like the Service Manager or Service Advisors, and the Parts Manager.

**Benefits:**

- Demonstrates "*professionalism*"
- Shows respect for customer's time and commitment to buying a XYZ.
- Reinforces the relationship.
- Provides a resource for future referrals.

XYZ Resource Materials:

- Owner Portfolio: Owner's Manual, Warranty Information Booklet
- Delivery Checklist
- "Delivery Tips" section of the ***Product & Comparison Guide***
- "Thorough Delivery" training video
- Please also refer to the grid located on page 23 of this document

All new vehicles will be delivered to the customer with no defects.

Measurement:

- NVDC Index.

Customer Objectives:

- Receive vehicle in “showroom condition”
- Start enjoying their new car
- Confirm decision about dealership and Salesperson

Sales Objectives:

- Ensure vehicle is in “showroom condition” prior to delivery
- Continue to build relationship with customer
- Demonstrate dealership’s commitment to excellence

Professional Image:

- Dealership cares enough to deliver vehicles that are “defect-free”
- Commitment to customer’s satisfaction
- Everything is right from the start

Basic Steps:

- 1) Immediately after the sales contract is finalized, prepare the vehicle for delivery.
- 2) Salesperson assures that the Service Department has completed the pre-delivery inspection.
  - If there are any problems, they are remedied prior to delivery.
  - Make sure all dealer-installed accessories have been installed.
  - Do not release any vehicles that are not ready.
- 3) Prior to delivery, all operating systems should be readied for operation (e.g., setting stations on the audio system, etc.).
- 4) Salesperson assumes full responsibility for delivery quality of vehicle.

Best Practices:

**Dealership Facilities:**

- Ensure that vehicles on the lot are properly maintained.
  - ⇒ Keep lot vehicles free from damage.
  - ⇒ Have vehicles spaced apart so there is ample space door-to-door and bumper-to-bumper.
  - ⇒ Salespeople should take care when opening doors so they do not “ding” other vehicles.
  - ⇒ Whenever anyone finds damage, it should be reported and corrected immediately.
  - ⇒ Periodically wash lot vehicles.
- Establish a system for final cleaning and detailing of vehicles prior to delivery.
  - ⇒ “Get ready” staff should use protective coverings when preparing the vehicle.
  - ⇒ Assign responsibility to handle car wash duties for night and weekend spot deliveries.

### Dealership Management:

- Sales Manager should inspect vehicles from the customer's point of view.
  - ⇒ Make sure all vehicles are clean and parked with sufficient space around them.
  - ⇒ Examine vehicles that were recently test-driven and arrange for cleaning, if necessary.
- Create a route board to track vehicles through the prep process.
- Utilize vinyl car covers to surprise customer by delivering their vehicle "in the wrapper" (this also eliminates the need to re-clean the vehicle if the delivery is delayed).
- Hold meetings with the Sales Staff to draw attention to vehicle quality at the time of delivery.
  - ⇒ Salespeople should "*sign-off*" on a vehicle after it is prepared, prior to delivery.
- Review *Delivery Checklists* after the delivery to ensure vehicle was "perfect" at the time of delivery.
- Consider having a technician on duty after-hours to handle night and weekend deliveries.
- Review CARE Sales/Delivery Condition scores to monitor progress.

### Salespeople:

- Immediately after the sales contract is finalized, inspect the vehicle for delivery condition.
- Personally check the vehicle:
  - ⇒ Check the exterior and interior to determine if anything needs to be repaired.
  - ⇒ Ensure the vehicle received a thorough Pre-Delivery Inspection (PDI).
  - ⇒ Have the battery checked; charge, if necessary.
  - ⇒ Check to make sure the vehicle is operating properly -- check the engine to make sure it starts and runs as expected; check the air conditioning, turn signals and audio system.
  - ⇒ Verify the clock is set to the correct time.
  - ⇒ Verify the stations are set on the audio system.
- Schedule the installation of accessories.
  - ⇒ Afterwards, confirm they were properly installed.
- Schedule the vehicle for cleaning inside and out.
- Check to make sure the fuel tank is full.
- Conduct a final inspection of the vehicle prior to delivery, verifying that it has been prepared as specified.
  - ⇒ Re-check the exterior and interior to make sure the vehicle will meet your customer's expectations -- look at it from the customer's point of view.
  - ⇒ Verify that all accessories that were purchased have been installed (if any are missing, complete a "Due Bill" and confirm the delivery date and installation time).
  - ⇒ Review all areas of the vehicle using the Delivery Preparation section of the Sales Delivery Checklist.
- Check the contents of the Sales portfolio to confirm that all items are included:
  - ⇒ Owner's Manual.
  - ⇒ Pre-Delivery Inspection sheet.
  - ⇒ XYZ warranty information.
- Verify you have a complete set of keys for the customer.
- If customer insists on delivery of a vehicle that is not fully prepared (i.e., after-hours delivery), invite customer back -- at their convenience -- for thorough detailing of the vehicle.

**Benefits:**

- Customers get “perfect” vehicle at time of delivery.
- Demonstrates dealership’s commitment to the customer.
- Reinforces the relationship.
- Has a positive impact on customer satisfaction.

**XYZ Resource Materials:**

- Sales Delivery Checklist
- Sales Portfolio
- “Thorough Delivery” training video
- Please also refer to the grid located on page 23 of this document



All customers will have a consistent sales experience delivered by a knowledgeable Salesperson who actively listens, and ensures needs are met.

#### Measurement:

- Question 1k: *Thinking about your XYZ Salesperson, please indicate your level of satisfaction with: Overall performance of your Salesperson.*

#### Customer Objectives:

- Actively participate in sales process
- Gain information about XYZ vehicle
- Feel comfortable with dealership and Salesperson
- Express individual needs
- Determine if they want to buy

#### Sales Objectives:

- Provide a customer-focused sales experience
- Establish control of the process
- Learn customer's needs
- Build credibility
- Help process move forward at all times

#### Professional Image:

- Demonstrate professionalism
- Foster a customer-focused environment
- Enhance credibility

#### Basic Steps:

- 1) Salesperson asks needs-based, open-ended questions to find out which XYZ vehicle best meets the customer's needs and desires:
  - Thoroughly interview customers to determine their vehicle needs.
- 2) Salesperson listens and makes assessment of clients needs.
- 3) Salesperson restates information back to customer, verifying his/her understanding of the customer's needs.
  - Answer any questions the customer may have at that time.

#### Best Practices:

##### **Dealership Management:**

- Support the consultative sales process.
  - ⇒ Develop a customer-focused sales process that works for your sales environment.
  - ⇒ Train Salespeople in proper process of selling.
  - ⇒ Monitor Salesperson performance and coach for improvement, where necessary.
- Develop and maintain a stringent product and sales training program for Salespeople.
  - ⇒ Develop a checklist of wants/needs qualifying questions to be utilized by the Sales Manager; monitor Salesperson performance against the checklist, coaching for improvement when necessary.
  - ⇒ All new Salespeople should participate in XYZ's **Sales Leadership Series** as well as product knowledge training at the dealership.
  - ⇒ Sales certification is required.

- Offer formal training on inbound telephone skills to strengthen advisory relationship with customers.
- Consult one-on-one with any Salesperson who continues to use pressure sales tactics (advise that if such tactics continue, termination will result).
- Create special note pads that list appropriate sales questions and procedures; the information should be printed in light gray.
  - ⇒ Questions can include: customer use, driving miles, length of ownership, number of family members, etc.
  - ⇒ Salespeople use the note pads to jot down information; if they hit a block during the sales process, they look down at their notes and see the hints on the pad.

### **Salespeople:**

- Be knowledgeable about:
  - ⇒ XYZ product features, advantages and benefits.
  - ⇒ Dealership operations.
  - ⇒ Dealership services.
  - ⇒ Competitive vehicles.
  - ⇒ Finance options.
  - ⇒ Aftermarket products.
  - ⇒ Basic vehicle warranty and extended service plans.
  - ⇒ Maintenance requirements of XYZ products.
  - ⇒ Promotions, incentives, and rebates.
  - ⇒ Status of inventory/vehicle availability.
- Salesperson establishes an advisory relationship with the customer by:
  - ⇒ Recognizing customer's need for honest and sincere treatment.
  - ⇒ Listening to the customer and understanding their needs.
  - ⇒ Determining the customer's vehicle needs and wants.
  - ⇒ Suggesting vehicle alternatives to fit customer wants and needs.
  - ⇒ Confirming that selected vehicle fits customer wants and needs.
  - ⇒ Showing concern for customer wants and needs.
- Emphasis is placed on listening skills as they relate to the sales situation.
- Incorporate steps in the selling process which help to sell the total dealership value (not just price).
- Customers are greeted on the lot upon arrival; unless they indicate the intent to browse, they are invited into the sales area.
- Initial time spent with the customer explores their wants and needs.
- The use of product literature and other supporting materials allows the Salesperson to focus on the features and benefits of the vehicle(s) that most closely matches needs.
  - ⇒ This is a key step, allowing the Salesperson to establish an advisory relationship and relax the customer.
- After the Salesperson and the customer agree on a particular model, they move out to the lot, select a vehicle, and a brief product presentation is made.
- Provided that the right vehicle has been selected, a demonstration drive is offered.

**Benefits:**

- Focuses on the relationship with the customer.
- Builds “value” in the dealership.
- Enhances the image of the dealership and of XYZ.

**XYZ Resource Materials:**

- Please also refer to the grid located on page 23 of this document

Customer follow-up will begin within 3 days of the vehicle delivery in order to respond quickly to any customer concerns and ensure total satisfaction.

Measurement:

- CARE question 8e: *When you took delivery of your new XYZ: Were you contacted after delivery to ensure your satisfaction?*

Customer Objectives:

- Maintain a familiar and trusted resource for buying a new vehicle
- Know the dealership is personally interested in their satisfaction and their business

Sales Objectives:

- Reassure customer that they made the right decision buying from them
- Develop source for referrals and repeat business
- Build customer loyalty
- Create “customers for life”

Professional Image:

- Demonstrate you care – even after the sale
- Customer made the right choice for a Salesperson and dealership
- Respect for the customer’s time and commitment

Basic Steps:

- 1) Dealership requires that all clients (buyers and non-buyers) be recorded in a traffic control log.
  - This information should be recorded on dealership computer system, if available.
  - Create a “*manual*” client file.
- 2) Salesperson contacts non-buyers to continue building a relationship.
- 3) Salesperson communicates with buyers within three days after taking delivery:
  - Contact customer via telephone.
  - Ensure customer is still satisfied with their new XYZ.
  - Answer any questions.
  - Offer assistance.
  - Ask for referrals.
- 4) Salesperson maintains contact with customer over their length of ownership.
  - Stay in contact via telephone or sending a note or postcard.
- 5) Ask the customer when would be a convenient time for a follow-up phone call.
  - If the client states a phone call is inappropriate, ask them what method of follow-up they would prefer.

### Best Practices:

#### **Dealership Management:**

- Involve all Sales Staff employees in a commitment to follow-up and long-term customer retention.
  - ⇒ Establish a formal dealership policy and procedures for follow-up.
  - ⇒ Develop a systematic approach to follow-up and continued personal customer contacts.
  - ⇒ Implement a method for tracking sales follow-up for both buyers and non-buyers.
- Monitor performance on a weekly basis.
- Maintain a call report list that has to be filled out by the Salesperson detailing customer name, telephone number, vehicle information, etc.
- Make follow-up mandatory:
  - ⇒ Establish a policy that requires Salespeople to speak with the individual who actually took delivery of the vehicle.
- Consider creating the position of Quality Control Coordinator:
  - ⇒ They would be responsible for follow-up activities:
    - ◆ Filling out follow-up forms.
    - ◆ Preparing “thank you” letters.
    - ◆ Follow-up form and thank you letters are given to Salesperson.
    - ◆ Salesperson calls customer.
    - ◆ Follow-up form, letters and comments are returned to QC Coordinator.
    - ◆ QC Coordinator revises letters, if necessary, mails out letters.
- Hold weekly meetings to provide ongoing support and consistent orientation for new hires.

#### Dealer Terminations/Orphaned Customers:

- MNAO has established a program for notifying customers when their dealer terminates; you should implement an “orphan owner” procedure to track these owners when they are referred to your dealership.
  - ⇒ A personalized letter from MNAO notifies the customer that their dealership is no longer an authorized XYZ dealer and refers them back to the XYZ dealer who they already have a relationship with (if that customer has been using another dealership for warranty or service), or to the next closest XYZ dealer.
  - ⇒ The Region will deliver this information to the appropriate dealers.
  - ⇒ The Region and Dealer should work together to prospect these customers.
    - ◆ Establish two programs -- one to focus on the sale of new or used vehicles; the other to build Service department business.

#### **Salespeople:**

- Make sure Salespeople are aware of dealership policy for customer satisfaction in general and performing follow-up calls in specific.
- Establish a personalized follow-up approach.

- Utilize different methods for follow-up:
  - ⇒ Thank you cards.
  - ⇒ Birthday cards.
  - ⇒ Newsletters – published at least quarterly.
- Have two types of follow-up:
  - ⇒ Customers who buy.
  - ⇒ Customers who do not buy.
- Have Quality Control Manager (or Sales Manager) make repeat follow-ups if customer satisfaction is questionable.
  - ⇒ Make every effort to eliminate the cause of dissatisfaction.
- Salespeople personally deliver license plates, touch-up paint, and a gift bag from the dealership within two weeks after delivery.
- Obtain customers' daytime telephone numbers; indicate on tickler file if it is okay to call them at work.
- Salespeople are required to hand-address, hand-write a note, and hand-stamp cards for all sold customers each month.

**Benefits:**

- Sends a strong “*we care*” message to the customer.
- Continues two-way communication.
- Focuses on the relationship.
- Empowers the people closest to the customer.

**XYZ Resource Materials:**

- Please also refer to the grid located on page 23 of this document