

**MANAGEMENT  
BEST PRACTICES**

**Inbound Sales Call Management**

1. Components of a Solid Inbound Sales Call Process
2. All Calls Recorded
3. Receptionist Log
4. Phone Opportunity Card
5. 15 Minute Follow-Up Window
6. Sales Management Engagement & Inbound Sales Call Accountability

**Inbound Service Call Management**

1. Components of a Solid Inbound Service Call Process
2. Service Reception & Identifying Fresh Inbound Service Calls
3. Identifying Fresh Service Opportunities Tracking Non-Appointable Calls
4. Consistent Service Call Process with the Inbound Service Call Script
5. Tracking No-Book Calls
6. Service Management Engagement & Inbound Call Accountability

**Understanding Proactive Campaigns**

1. What is a Proactive Campaign?
2. Campaign Selection
3. Who Should Make Campaign Calls?
4. Campaign Scripting & Coaching
5. Campaign Call Schedule
6. Measure Campaign Results
7. Ongoing Evaluation

**Proactive Sales Campaigns**

1. Types of Sales Campaigns
2. Sales Campaign Builder
3. Sales Management Engagement & Sales Campaign Accountability

**Proactive Service Campaigns**

1. Types of Service Campaigns
2. Service Campaign Builder
3. Service Management Engagement & Service Campaign Accountability

**Phone Skills Success**

1. Call Theory
2. Call Success
3. Embrace the Customer
4. Always Ask for an Appointment
5. Transfer of Opportunity (TOs)

**Understanding Today's Customers**

1. Understanding Today's Customers
2. Phone Experience Challenges
3. Build a Great Customer Experience

**Phone Customer Experience for Sales**

1. Sales Phone Self-Assessment
2. Greeting Best Practices for Sales Customer
3. Call Transfer Best Practices for Sales Customer
4. Creating a Consistent Sales Phone Experience

**Phone Customer Experience for Service**

1. Service Phone Self-Assessment
2. Greeting Best Practices for Service Customers
3. Call Transfer Best Practices for Service Customers
4. Creating a Consistent Service Phone Experience

**SALES SKILLS**

**Sales Phone Skills**

1. Be the Customer's Friend in the Car Business
2. The Importance of Flexibility
3. The Answer (& the Vehicle) is at the Dealership
4. Why You Need Sales Scripts
5. Sales Performance/KPI
6. Sales Pattern Interrupts & Power Phrases
7. Understanding Your Unique Selling Proposition (10-10-10-10)

**Sales Contact Strategies**

1. Capturing Customers Name & Phone Number
2. Asking for an Email Address
3. Asking for a Second Number
4. The Double Tap Technique
5. Effective Sales Messaging

**Sales Appointment Strategies**

1. Now/Same Day Appointments
2. Solid vs. Soft Appointments
3. Using Questions to Funnel the Appointment
4. Written Appointment Confirmation
5. Using an Appointment Confirmation Process

**Steps to the Inbound Sales Call**

1. Greeting
2. Qualifying Questions (General)
3. Get Name & Number (General)
4. Get Name & Number (Specific)
5. Flexibility/Qualifying Questions (Specific)
6. Set a Solid Sales Appointment
7. Sell it in Writing
8. Conclusion
9. Inbound Sales Call Role Play

**Steps to the Outbound Sales Call**

1. Be Prepared
2. Verify
3. Get the Green Light
4. Introduction
5. Reason for Calling
6. Set a Solid Sales Appointment
7. Sell it in Writing
8. Conclusion
9. Outbound Call Role Play

**Sales Customer Follow-Up Activity**

1. Unappointed
2. Missed
3. Unsold

**Proactive Sales Campaign Activity**

1. What is a Sales Campaign?
2. Sales Campaign Theory
3. Sales Campaign Mechanics
4. Sales Campaign Scripting

**Sales Customer Concerns & Objections**

1. Understanding Sales Customers Concerns & Objections
2. Theory Behind the Five Customer Concerns
3. Price Rebuttals
4. Payment Rebuttals
5. Down Payment/Credit Rebuttals
6. Trade Rebuttals
7. Selection Rebuttals

**CUSTOMER EXPERIENCE**

**SERVICE SKILLS**

**Service Phone Skills**

1. Help the Customer Manage the Maintenance of their Vehicle
2. The Importance of an Alternate Service
3. The Answer (& the Vehicle Maintenance/Repair) is at the Dealership
4. Why You Need Service Scripts
5. Service Performance/KPI
6. Pattern Interrupts
7. Understanding Your Unique Servicing Proposition (10-10-10)

**Service Contact Strategies**

1. Verify & Update Customer Records on the Service Call
2. Effective Service Messaging

**Steps to the Inbound Service Call**

1. Greeting
2. Name & Number
3. Customer Record Verification/Update
4. Primary Concern
5. Review Vehicle History
6. Maintenance Upsell
7. Check for Recalls
8. Transportation Needs
9. Set a Solid Service Appointment
10. Confirm it in Writing
11. Non-Maintenance Upsell
12. Conclusion
13. Inbound Service Call Role Play

**Steps to the Outbound Service Call**

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**Service Customer Follow-Up Activity**

1. Unappointed
2. Missed

**Proactive Service Campaign Activity**

1. What is a Service Campaign?
2. Service Campaign Theory
3. Service Campaigns Mechanics
4. Service Campaign Scripting
5. Special Order Parts
6. Pre-Booked Maintenance

**Service Customer Concerns & Objections**

1. Understanding Service Customers Concerns & Objections
2. Building Value in Services
3. Service Rebuttals

**RECEPTIONIST  
SKILLS**

**Receptionist Best Practices**

1. Greeting
2. Call Process
3. Identify the Customer's Needs
4. Use a Warm Transfer

## BUSINESS DEVELOPMENT

### Understanding Business Development for Sales BDRs/Agents

1. Sales BDR/Agent Role in Business Development
2. Sales BDR/Agent Daily Expectations

### Understanding Business Development for Salespeople

1. Salesperson Role in Business Development
2. Working with Sales BDRs/Agents
3. Salesperson Daily Expectations

### Phone Skills Success

1. Call Theory
2. Call Success
3. Embrace the Customer
4. Always Ask for an Appointment
5. Transfers of Opportunity (TOs)

### Chat Skills Success

1. Chat Theory
2. Chat Success

### Text Skills Success

1. Text Theory
2. Text Success

## SALES SKILLS

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### Handling Sales Internet Leads

1. Internet Theory
2. Internet Process
3. Internet Messaging
4. Constructing an Effective Email Response
5. Internet Contact Strategies

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3. Unsold

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5. Down Payment/Credit Rebuttals
6. Trade Rebuttals
7. Selection Rebuttals

## SALESPERSON SKILLS

### Salesperson Best Practices

1. Prospecting & Referrals
2. Using a Reverse TO to Increase Sales
3. Handling Appointments Effectively

## BUSINESS DEVELOPMENT

### Understanding Business Development for Service BDRs/Agents

1. Service BDR/Agent Role in Business Development
2. Service BDR/Agent Daily Expectations

### Understanding Business Development for Service Advisors

1. Service Advisor Role in Business Development
2. Working with Service BDRs/Agents
3. Service Advisor Daily Expectations

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1. Call Theory
2. Call Success
3. Embrace the Customer
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### Chat Skills Success

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2. Chat Success

### Text Skills Success

1. Text Theory
2. Text Success

## SALES SKILLS

### Service Phone Skills

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2. Effective Service Messaging

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5. Review Vehicle History
6. Maintenance Upsell
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11. Non-Maintenance Upsell
12. Conclusion
13. Inbound Service Call Role Play

### Steps to the Outbound Service Call

1. Be Prepared
2. Verify
3. Get the Green Light
4. Introduction
5. Reason for Calling
6. Transportation Needs
7. Set a Solid Service Appointment
8. Confirm it in Writing
9. Conclusion
10. Outbound Service Call Role Play

### Handling Online Service Scheduling Requests

1. Online Service Scheduling Requests

### Handling Onboard Vehicle Diagnostics

1. Online Vehicle Diagnostic Leads

### Service Customer Follow-Up Activity

1. Unappointed
2. Missed

### Proactive Service Campaign Activity

1. What is a Service Campaign?
2. Service Campaign Theory
3. Service Campaigns Mechanics
4. Service Campaign Scripting
5. Special Order Parts
6. Pre-Booked Maintenance

### Service Customer Concerns & Objections

1. Understanding Service Customers Concerns & Objections
2. Building Value in Services
3. Service Rebuttals

## SERVICE ADVISOR SKILLS

### Service Advisor Best Practices

1. Greeting Service Customers
2. Effective Service Write Up
3. Status Update Process
4. Post Write Up Consultation
5. Delivery & Pre-Booking

**CUSTOMER EXPERIENCE**

**Understanding Today's Customers**

1. Understanding Today's Customers
2. Phone Experience Challenges
3. Internet Experience Challenges
4. Dealership Experience Challenges
5. Building a Great Customer Experience

**Phone Customer Experience for Sales**

1. Sales Phone Self-Assessment
2. Greeting Best Practices for Sales Customers
3. Call Transfer Best Practices for Sales Customers
4. Creating a Consistent Sales Phone Experience

**Internet Customer Experience for Sales**

1. Sales Internet Self-Assessment
2. VIP Sales Internet Customer Experience

**Dealership Customer Experience for Sales**

1. Sales Dealership Self-Assessment
2. VIP Showroom Customer Experience
3. Reverse TO
4. Sales Appointment Show Process

**BUSINESS DEVELOPMENT**

**Introduction to Business Development**

1. What is Business Development?
2. Business Development Purpose & Functions

**Understanding Business Development - Management**

1. Business Development Models
2. Finding the Right Business Development Model
3. What's in it for me?
4. Understanding the Management Role in BD
5. Lead Management
6. Process Management
7. Performance Management
8. Success Traits

**Understanding Business Development - Marketing**

1. What's in it for Marketing?
2. Understanding the Marketing Role in BD
3. Marketing Strategies & Alignment

**Understanding Business Development - Floor Coordinator/Manager**

1. What's in it for the Floor Coordinator/Manager?
2. Floor Coordinator/Manager Role in BD

**Staffing Size for Sales**

1. Staffing Size for Sales

**Building BDM Pay Plans**

1. BDM Pay Plan Recommendations

**Building Sales BDR/Agent Pay Plans**

1. Sales BDR/Agent Pay Plan Recommendations

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1. What is a Proactive Campaign?
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**Key Performance Indicators**

1. Activities
2. Calls
3. Contacts
4. Appointments
5. Shows
6. Solds
7. TOs

**Appointment Management**

1. Importance of Appointment Management
2. Appointment Confirmation Process
3. Cancelled Appointment Process
4. Missed Appointment Process
5. Reverse TO

**Management Engagement**

1. Importance of Management Engagement
2. Hourly Engagement
3. Sales Daily Management
4. Service Daily Management
5. Weekly Management
6. Monthly Management

**Training & Reinforcement**

1. Three Aspects of Learning
2. Daily Training & Reinforcement
3. Leveraging Call Recording
4. TOs
5. Effective Script Training

**Motivating Your Team**

1. Goals & Expectations
2. Importance of Success
3. Keeping it Fun

**SALES MANAGEMENT**

**Sales Lead Management**

1. Understanding Sales Lead Management
2. Handling Fresh Inbound Sales Leads
3. Sales Lead Follow-Up

**Inbound Sales Call Management**

1. Components of a Solid Inbound Sales Call Process
2. All Calls Recorded
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4. Phone Opportunity Card
5. 15 Minute Follow-Up Window
6. Sales Management Engagement & Inbound Sales Call Accountability

**Floor Management**

1. Components of a Solid Floor Process
2. Floor Coordinator/Manager
3. Floor Opportunity Card
4. 45 Minute Follow-Up Window
5. Sales Management Engagement & Floor Accountability

**Internet Management**

1. Components of a Solid Internet Process
2. Internet Response Time
3. Phone & Text Response Quality
4. Email Response Quality
5. Internet Priority of Activities
6. Sales Management Engagement & Internet Accountability

**Chat Management**

1. Components of a Solid Chat Process
2. Sales Management Engagement & Chat Accountability

**Text Management**

1. Components of a Solid Text Process
2. Sales Management Engagement & Text Accountability

**Proactive Sales Campaigns**

1. Types of Sales Campaigns
2. Sales Campaign Builder
3. Sales Management Engagement & Sales Campaign Accountability

**Managing Your Sales Business Development Initiative**

1. Daily Sales Management Huddle
2. Priority of Sales Activities
3. Importance of Sales Management Engagement
4. Hourly Management
5. Daily Management
6. Weekly Management
7. Monthly Management

**Troubleshooting KPI**

1. Low Sales Activity Volume
2. Low Sales Contact Ratio
3. Low Sales Appointment Ratio
4. Low Sales Show Ratio
5. Low Sales Closing Ratio

**Measuring Success for Sales**

1. Sales Benchmarking
2. Success Measurement

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1. Service Drive Self-Assessment
2. VIP Service Drive Experience

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**Staffing a BDC**

1. Finding the Right People
2. BDM Job Description
3. BDR/Agent Job Description
4. Proper Staffing Levels

**Staffing Size for Service**

1. Staffing Size for Service
2. Staffing to Maximize Service Capacity

**Building BDM Pay Plans**

1. BDM Pay Plan Recommendations

**Building Service BDR/Agent Pay Plans**

1. Service BDR/Agent Pay Plan Recommendations

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**Online Service Scheduling Management**

1. Components of a Solid Online Scheduling Process
2. Online Service Scheduling Response
3. Service Management Engagement & Online Scheduling Accountability

**Onboard Vehicle Diagnostics (OVD) Management**

1. Components of a Solid OVD Lead Process
2. OVD Response
3. Service Management Engagement & OVD Accountability

**Proactive Service Campaigns**

1. Types of Service Campaigns
2. Service Campaign Builder
3. Service Management Engagement & Service Campaign Accountability

**Managing Your Service Business Development Initiative**

1. Service Management Huddle
2. Priority of Service Activities
3. Status Update Process Management
4. Pre-booking Process Management
5. Service Capacity & Work Mix

**Troubleshooting KPI**

1. Low Service Activity Volume
2. Low Service Contact Ratio
3. Low Service Appointment Ratio
4. Low Service Show Ratio

**Measuring Success for Service**

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2. Success Measurement