

Pre-Work:

1. Review **CRM history for facts** - Sales & Service frequency? Last visit date? Advisor name?
2. Look at vehicle history in CARFAX, Dealer Track, AutoMate, AutoAlert etc. State VIN search.

Step One: Introduction | 🎯 Helping hand vibes! Vehicle flexibility! Lead convo!

Hi, ____? I'm so glad you picked up! This is ____ in Guest Experiences here at <Dealership Name>. Thanks for taking my call!

You bought your <Year><Make><Model> from us. Are you still enjoying it?

Great to hear! OR Why, what's going on?

(LOYALTY PLAY) We certainly appreciate you and your past business in both our sales and service departments. State some facts! (HOOK) A few things have changed since you bought your car and I know you will be needing a new car soon so I wanted to be sure you knew what to expect so you don't come up short because vehicles aren't available like they used to be. Do you know what's going on with inventory?

It's been tough this past year. Very limited production. 3 x as many customers as cars so it's a fight out there to get what you want. We have to plan ahead now. One client I know waited months to get a vehicle and we do not want this happening to you. BUT ALSO something else is going on impacting the value of your vehicle. This situation drove up values on our clients cars. You can take advantage of this while it lasts.

Step Three: Review Vehicle

Identify flexibility, hot buttons and deal breakers.

Has anything changed in your life since you bought your <MODEL> that is causing you to need something bigger, smaller or same size?

We're there any features you wished you had? What are most important features now? Open to brands in same class? [VALUE] Share any upgrades/differences in model year changes.

Step Two: Value in You and Car Buying Experience

- Set Expectations of Visit/Gain commitment to meeting

I can think of _#_ options right now that don't have someone's name on it. There is a bit of urgency to come in now to get your vehicle appraised and look at options. We have a great team who will help me make this easy and efficient. We will get ready ahead of time to make best use of your time.

New Benefits: Maintenance plans that save you \$, warranty that reduces risk, better gas mileage, etc.

Step Four: Tie Second Person to Meeting -Schedule Local Buyer/Set Up Meeting with <Brand> Manager/Team Leader

Here's what I will do, I will block off time just for you. Schedule our appraiser <Name> to be ready. I'll get some vehicle matches ready to show you. I want to make the best use of your time and make this simple.

Step Five: Set Appointment

What are you doing now/today? I have a _:15 or a _:45, Promise Confirmation Email, Ask if OK to Text?, Send Text with Address, Ask them to Text You ETA, <State Car Will Be Ready>.



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