

Coaching Checklist



PHASE 1

SET THE STAGE



Goals:

1. Provide the information the customer is seeking
2. Provide alternatives if applicable
3. Outline the benefits of an appointment
4. Execute agreed-upon actions
5. Explain next steps

Introduction and Initial Rapport Building

- Gave warm, friendly greeting
- Offered your name; asked the customer for name
- Used positive tone of voice

Set Expectations

- Asked questions to understand customer needs
- Made recommendation to customer
- Answered customer's questions
- Sounded genuine, not robotic or rehearsed
- Used guest-centered language and avoided demands

Customer's Agreement to Continue

- Got customer's agreement to continue

PHASE 2

LISTEN & LEARN



Goals:

1. Ask questions to gain understanding
2. Confirm your understanding
3. Get the customer to trust us

Ask Questions to Learn

- Gathered detail on the vehicle of interest
- Obtained details on current vehicle
- Demonstrated active listening skills
- Asked questions that directly pertained to customer's situation
- Addressed customer concerns expressed
- Outlined reason to choose store
- Confirmed information and got customer validation

PHASE 3

NEXT STEPS/CLOSE INTERACTION



Goals:

1. Provide the information the customer is seeking
2. Provide alternatives if applicable
3. Outline the benefits of an appointment
4. Execute agreed-upon actions
5. Explain next steps

Addressed Needs

- Provided information customer sought
- Knew the product and options
- Turned features into benefits that customer related with
- Provided alternatives, if applicable
- Validated and empathized customer's concerns before addressing them
- Outlined the benefits of an appointment

Explained Next Steps

- Told customer what next steps would be taken
- Confirmed customer's contact and communication preferences
- Reiterated and confirmed next steps discussed
- Sincerely thanked customer, regardless of commitment level

PHASE 4

ACTION PLAN



Goals for Improvement:

- 1.
- 2.
- 3.
- 4.
- 5.