

# Sales Customer Touchpoints

## Best Practices



Name:  Date/Time of Call:

Best Practices	Achieved?	Agent Action
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### TOUCHPOINT: Positive First Impressions

**Positive body language and tone of voice?**

- Smile heard through the phone
- Spoke loudly enough to be heard and slowly enough to be understood

Yes  No

**Attitude of gratitude?**

- Thanked the customer for calling/holding

Yes  No

**Identified dealership?**

- "ABC Vehicle..."

Yes  No

**Identified department and self?**

- "This is Cory in sales..."

Yes  No

**Offered assistance?**

- "What information can I get for you?" "Where may I direct your call?"

Yes  No

### TOUCHPOINT: Establishing Trust & Exploring Needs

**Complimented customer (if applicable)?**

- "Nice car!" "Great choice."

Yes  No

**Promised to serve?**

- "I'd be happy to help with that."
- "I'd be happy to see if it's available."

Yes  No

**Explored needs and established rapport by asking the right questions?**

- "What about the car caught your attention?"
- "What are you driving now?"
- "Have you done business with us before?"

Yes  No

**Listened and took notes?**

- Actively listened and took notes

Yes  No

**Displayed empathy**

- Showed the customer that you understood

Yes  No

### TOUCHPOINT: Providing Transparent Service

**Checked for understanding?**

- Restated customer's concern: "Let me confirm, you're looking for..."

Yes  No

**Earned Contact Information?**

- "Are you calling from home or work?"
- "And that number is"
- "Can you spell your last name? And your first name is?"

Yes  No

**Reintroduced yourself?**

- Reintroduced self
- Gave full name

Yes  No

**Answered questions transparently?**

- Provided the information the customer needed during the call
- Was honest and forthcoming with information

Yes  No

**Kept your customer as the primary focus?**

- Stayed tuned in to customer's needs

Yes  No

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## Best Practices

## Achieved?

## Agent Action

### TOUCHPOINT: Identifying Next Steps

#### Explained appointment experience?

- Allowed customer to visualize the appointment—painted the picture
- Shared benefits of the appointment

Yes No

#### Invited to dealership and provided options?

- Used either/or statements to narrow appointment time
- Provided options for handling appointment

Yes No

#### Set the time that was best for customer?

- Ensured appointment time was best option for customer

Yes No

#### Provided visual directions?

- Ensured caller knew how to get to dealership
- Provided landmarks/exits as direction markers

Yes No

### TOUCHPOINT: Positive Lasting Impressions

#### Offered to text/email additional info?

- Additional photos/videos, Carfax
- Contact information, details of conversation
- Information about alternate vehicles
- Appointment confirmation

Yes No

#### Reiterated appointment details?

- "Your appointment is at 3:15 on Friday! You'll have the opportunity to look over the car and then we will take it for a sweet test drive!"

Yes No

#### Recapped conversation?

- Reviewed what was discussed during conversation
- Used notes to ensure complete information

Yes No

#### Provided contact information and established communication preferences?

- Provided your direct contact information
- Considered offering your cell number and/or providing an electronic business card

Yes No

#### Thanked customer for calling?

- Thanked customer for calling
- Maintained positive tone

Yes No

## Scoring

Count the number of times you answered "Yes"

### SCORE 20+: Top Performer!

Congratulations! You are a top performer in using best practices in providing phone service to your customers!

### SCORE 12-19: Among the Pack

You are on par with industry average. Visit [FixthePhones.com](http://FixthePhones.com) to download our best practices, view coaching videos, and sign up for free live webinar training.

### SCORE < 12: Opportunities Abound

You have some work to do to improve your Callers' experiences. Visit [FixthePhones.com](http://FixthePhones.com) to download our best practices, view coaching videos, and sign up for free live webinar training.