



***Suttons***

**Customer Purchase Experience**  
OPERATING STANDARDS GUIDE

# OPERATING STANDARDS GUIDE

The purpose of this manual is to provide a reference guide whereby employees can review operating guidelines and new employees can be efficiently introduced to the standard sales purchase procedures.

This Standards Guide will enable employees to:

1. Follow a set of step-by-step instructions to carry out routine **operations**.
2. Achieve efficiency, quality output and uniformity of performance, while reducing miscommunication and failure to comply with operating **procedures**.
3. Eliminate delays and customer dissatisfaction that occur when procedures are unclear.
4. Establish a **standard** of performance, where all employees show P.R.I.D.E in their day-to-day work activities.



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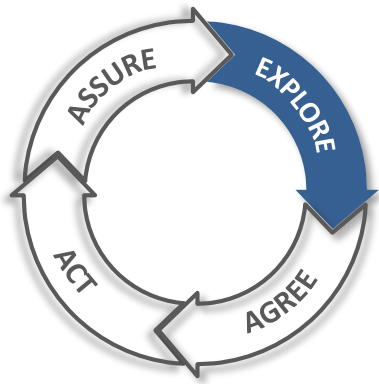
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# Defining the Customer Purchase Experience

The following is a defined customer purchase process that outlines the most vital and necessary steps in establishing a **standard** of performance for delivering a positive sales experience.

In accordance with Suttons Brand Promise (Sydney Trusts Suttons), each time you **Explore, Agree, Act** and **Assure**, the possibility for trust grows between you and your customers.





## STEP #1: EXPLORE for new and greater value

### EXPLORE means:

- Building awareness, rapport and mutual understanding.
- Asking open-ended questions and listening carefully to the answers.
- Learning more about your potential prospects and customers
- Helping them learn more about you.
- Determine what is possible? What is valuable? What can we do together?





# TAKING A PHONE ENQUIRY



ANSWER		<ul style="list-style-type: none"> <li>• Smile before taking the call</li> <li>• Be prompt</li> </ul>	<ul style="list-style-type: none"> <li>• Make the other person feel good by having a positive attitude.</li> <li>• Answer the call within 3 rings.</li> </ul>
GREET		<ul style="list-style-type: none"> <li>• Be warm and welcoming</li> <li>• Create a positive first impression</li> </ul>	<ul style="list-style-type: none"> <li>• Greet the caller with a verbal handshake.</li> <li>• Say, <i>“Good morning” or “Good afternoon.”</i></li> </ul>
INTRODUCE		<ul style="list-style-type: none"> <li>• Introduce the Dealership name and yourself</li> <li>• Project enthusiasm</li> </ul>	<ul style="list-style-type: none"> <li>• Say, <i>“Dealership name, “New/Used Vehicle Sales,</i></li> <li>• <i>“This is (Your name)”, not “(your name) speaking”.</i></li> <li>• Say, <i>“How may I assist you today?”</i></li> </ul>
LISTEN		<ul style="list-style-type: none"> <li>• Listen closely to the customer’s opening statement and respond accordingly</li> </ul>	<ul style="list-style-type: none"> <li>• Assure the customer you can help.</li> <li>• Say, <i>“Absolutely, I can help you with that.”</i></li> <li>• Establish rapport, use their name.</li> </ul>



# TAKING A PHONE ENQUIRY



CHECK		<ul style="list-style-type: none"> <li>• Summarise the customer's opening statement</li> <li>• Follow Phonestat</li> </ul>	<ul style="list-style-type: none"> <li>• Check to make sure you understand what the customer wants.</li> <li>• Ask questions to clarify details</li> <li>- Say, <i>"It is ok if I can ask you some questions to see how I can better serve you?"</i></li> </ul>
INFORM		<ul style="list-style-type: none"> <li>• Verbalise what you are doing</li> <li>• Put your personal touch into the contact</li> </ul>	<ul style="list-style-type: none"> <li>• Tell the customer what you are doing throughout the call.</li> <li>- Say, <i>"It will be just a moment for the screen to load. How are you doing today?"</i></li> </ul>
RECAP		<ul style="list-style-type: none"> <li>• Recap what you are going to do</li> <li>• Confirm next steps</li> <li>• Use appointment calendar invite template</li> </ul>	<ul style="list-style-type: none"> <li>• Wait for the customer's acknowledgement and acceptance to make sure you handled everything correctly.</li> <li>• Confirm with customer appointment calendar invite.</li> </ul>
CLOSE		<ul style="list-style-type: none"> <li>• Thank the customer for calling</li> <li>• Close the call</li> </ul>	<ul style="list-style-type: none"> <li>• Always end on a positive note.</li> <li>• Say, <i>"Thank you for calling and have a great day."</i></li> <li>• Let them hang up first.</li> </ul>



# WELCOMING A WALK-IN ENQUIRY





MEET		<ul style="list-style-type: none"> <li>• <b>Make eye contact</b></li> <li>• <b>Smile</b></li> </ul>	<ul style="list-style-type: none"> <li>• Acknowledge the customer immediately when approaching within (10) feet.</li> <li>• Create a positive first impression.</li> </ul>
GREET		<ul style="list-style-type: none"> <li>• <b>Be warm and welcoming</b></li> </ul>	<ul style="list-style-type: none"> <li>• Greet the customer within (5) feet.</li> <li>- Say, <i>“Good morning” or “Good afternoon.”</i></li> </ul>
INTRODUCE		<ul style="list-style-type: none"> <li>• <b>Introduce your Dealership and yourself</b></li> <li>• <b>Project enthusiasm</b></li> </ul>	<ul style="list-style-type: none"> <li>- Say, <i>“Welcome to Suttons (Dealership name)”</i></li> <li>• Shake hands with everyone in the group, including children.</li> <li>• Exchange names.</li> <li>- Say, <i>Hi, I’m (name), and how can I assist you today?</i></li> </ul>
ASK		<ul style="list-style-type: none"> <li>• <b>Listen closely to the customer’s opening statement and respond accordingly</b></li> <li>• <b>Redirect or escort them to the right place and introduce them to the right person if required.</b></li> </ul>	<ul style="list-style-type: none"> <li>- Say, <i>“Have you visited our dealership before?”</i></li> <li>- <i>“Are you here to see someone in particular?”</i></li> <li>- (YES) <i>“Who have you been dealing with?”</i></li> <li>- (NO) <i>“Is there anything specifically you would like information on?”</i></li> <li>• If the customer requests to be left alone initially, do so with a smile and keep an eye out from a distance.</li> </ul>



# PERSONALISING THE SERVICE EXPERIENCE



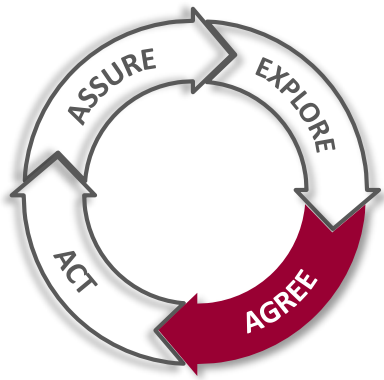
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>INVITE</b></p>		<ul style="list-style-type: none"> <li>• <b>Make them feel comfortable</b></li> <li>• <b>Offer the customer refreshments</b></li> <li>• <b>Detail location of amenities and facilities</b></li> </ul>	<ul style="list-style-type: none"> <li>• Invite the customer to sit down.</li> <li>- Say, <i>“Please take a seat and make yourself comfortable”</i>.</li> <li>• Use their name</li> <li>• Offer them a water or coffee if available.</li> <li>- Say, <i>“Would you like a coffee or a refreshment?”</i></li> <li>• Invite them to look around and let them know you’ll be with them shortly.</li> <li>- Say, <i>“Please do look around, the bathrooms are located at....and I’ll be with you very shortly”</i>.</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>DETERMINE</b></p>		<ul style="list-style-type: none"> <li>• <b>Discover the “What, Why, How, and When”</b></li> <li>• <b>Write notes and listen closely to the customers needs</b></li> </ul>	<ul style="list-style-type: none"> <li>• Conduct an analysis to determine the required needs of the customer.</li> <li>- <i>“Could you help me clarify your needs?”</i></li> <li>- <i>“What would you like to get out of this visit today?”</i></li> <li>- <i>“What are you specifically looking for?”</i></li> <li>- <i>“How familiar are you with that type of vehicle?”</i></li> <li>- <i>“What research have you conducted?”</i></li> <li>- <i>“What additional information do you require?”</i></li> <li>- <i>“What is most important to you?”</i></li> <li>- <i>“Are you looking at financing?”</i></li> </ul>



# PERSONALISING THE SERVICE EXPERIENCE



<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>CLARIFY</b></p>		<ul style="list-style-type: none"> <li>• <b>Clarify information</b></li> <li>• <b>Summarise key findings</b></li> </ul>	<ul style="list-style-type: none"> <li>• Clarify information and provide a summary of facts.</li> <li>• Let the customer know that you can offer them a tailored solution based on their needs and information provided.</li> <li>- Say, <i>“Thank you for the information and I know I can happily assist you with a personalised solution today.”</i></li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>OUTLINE</b></p>		<ul style="list-style-type: none"> <li>• <b>Explain and outline the customer in-store purchase journey</b></li> <li>• <b>How long – timeframe</b></li> </ul>	<ul style="list-style-type: none"> <li>- Say, <i>“So is it ok for me to explain our customer in-store purchase journey and what it involves?”</i></li> <li>- Say, <i>“We pride ourselves on providing our customers with a transparent and efficient purchase experience and we do believe this is what sets Suttons apart”</i>. Explain:             <ul style="list-style-type: none"> <li>- <b>Selecting the Vehicle</b></li> <li>- <b>Appraising the Vehicle</b></li> <li>- <b>Demonstrating the Vehicle</b></li> <li>- <b>Experiencing the Vehicle (Test Drive)</b></li> <li>- <b>Proposal and Price</b></li> <li>- <b>Securing the Vehicle</b></li> <li>- <b>Protecting the Vehicle</b></li> <li>- <b>Choosing a Handover Date</b></li> </ul> </li> </ul>



## STEP #2: AGREE with promises to each other

### AGREE means:

- Finding the common ground where all parties are motivated to succeed.
- Offering greater flexibility or a wider range of choices and information based on customer needs and wants
- Establishing clear terms and conditions.
- Confirming your commitments.

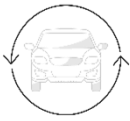




# DEMONSTRATING THE VEHICLE





<b>EXPLAIN</b>		<ul style="list-style-type: none"> <li>• <b>Discuss the differences and benefits between the model of vehicles selected</b></li> </ul>	<ul style="list-style-type: none"> <li>• You must have product knowledge to do this effectively.</li> <li>• Keep up to date on your product.</li> <li>• Outline warranty details</li> </ul>
<b>PRESENT</b>		<ul style="list-style-type: none"> <li>• <b>Conduct walk-around presentation</b></li> <li>• <b>Focus your presentation on the customer's needs from your notes</b></li> <li>• <b>Be flexible based on the customer's needs</b></li> </ul>	<ul style="list-style-type: none"> <li>• Point 1 – Front of vehicle</li> <li>• Point 2 – Under bonnet</li> <li>• Point 3 – Passenger door</li> <li>• Point 4 – Rear passenger door</li> <li>• Point 5 – Boot</li> <li>• Point 6 – Driver door</li> </ul>
<b>TARGET</b>		<ul style="list-style-type: none"> <li>• <b>Target points from initial exploration questions</b></li> </ul>	<ul style="list-style-type: none"> <li>• Get the customer involved.</li> <li>- Ask, <i>“What are your thoughts on the vehicle so far?” “Do you have any questions?”</i></li> <li>• Reiterate positives based on the customer's related needs.</li> <li>• Focus on hot points from exploration questions.</li> </ul>

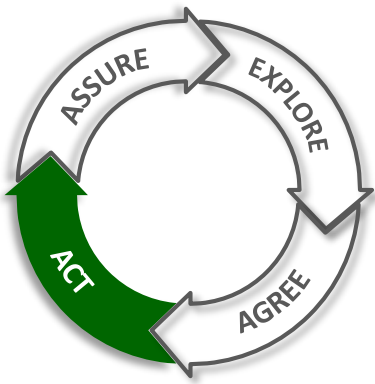


# APPRAISING THE VEHICLE

TRADE-IN APPRAISAL



<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>APPRAISE</b></p>		<ul style="list-style-type: none"> <li>• Offer to obtain an appraisal of current vehicle – no exception</li> <li>• Walk the trade with the customer</li> <li>• Make no negative comments about the trade in</li> <li>• Write up customer details in Appraisal Log</li> </ul>	<ul style="list-style-type: none"> <li>• Ask, <i>“Are you planning on trading your current vehicle?”</i></li> <li>• Say, <i>“To start, can we get figures on your vehicle?”</i></li> <li>• Explain, this will provide us with an opportunity to put forward a proposal with or without the trade.</li> <li>• Obtain customer details (full name, address, phone, email).</li> <li>• Ask about log books and service history.</li> <li>• Do you have two sets of keys?</li> <li>• Ask if the vehicle is under finance? Who with and how much per week?</li> <li>• Say, <i>“Your vehicle will be turned over to a valuer whilst we continue to look for a vehicle that best fits your needs”.</i></li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>BRIDGE</b></p>		<ul style="list-style-type: none"> <li>• Get agreement on selected vehicle</li> <li>• Ask bridging question to a test drive</li> </ul>	<ul style="list-style-type: none"> <li>• Use the customers name.</li> <li>• Say, <i>“It seems like we have found a vehicle that is close to what you had in mind, would you agree?”</i></li> <li>- Say, <i>“Next step, I will need to shoot a quick copy of your licence and I’ll go inside, get some plates and we’ll go for a test drive. Is that ok?”</i></li> </ul>



## STEP #3: ACT on the agreements you make

### ACT means:

- Doing what you promised to do.
- Guaranteeing a certain level of performance.
- Being proactive with your communications and providing reliable information.
- Tracking your agreements.
- If breakdowns occur, using your agreed contingency plans.
- Negotiating constructively.








TEST DRIVE

# EXPERIENCING THE VEHICLE



<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>PREPARE</b></p>		<ul style="list-style-type: none"> <li>• <b>Prepare for an accompanied test drive to show the customer how the vehicle suits their needs</b></li> <li>• <b>Expectation is that demonstration vehicle is ready and available</b></li> </ul>	<ul style="list-style-type: none"> <li>• Scan the customer's licence and have Drive Agreement signed.</li> <li>• Have a planned, approved test drive route.</li> <li>• Trade plates to be affixed to vehicle</li> <li>• Sales consultant drives first</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>ALLOW</b></p>		<ul style="list-style-type: none"> <li>• <b>Dealership to follow own test drive process</b></li> <li>• <b>Stop for change over and allow the customer to experience the vehicle</b></li> </ul>	<ul style="list-style-type: none"> <li>• Have a planned, safe, quiet spot for change over.</li> <li>• Take keys out of ignition at change over point.</li> <li>• Adjust seats and mirrors.</li> <li>• Show the customer over the controls.</li> <li>• Bluetooth customers phone.</li> <li>• Follow the designated route.</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>REFLECT</b></p>		<ul style="list-style-type: none"> <li>• <b>Give the customer some quiet time to reflect on the experience</b></li> <li>• <b>Define key questions to ask the customer</b></li> </ul>	<ul style="list-style-type: none"> <li>• Use probing questions to gain the customers insights about the vehicle. Ask about:             <ul style="list-style-type: none"> <li>- Features and Controls</li> <li>- Comfort and Ride</li> <li>- Steering</li> <li>- Power</li> <li>- Space</li> </ul> </li> </ul>



PRICE & REPAYMENT  
OPTIONS

# CHECKING OUT PRICE & REPAYMENTS



CONFIRM



- **Get agreement from the customer and write up the proposal**
- **Inform the customer of the timeframe and offer them refreshments whilst they wait**
- **All written proposals must be pre-approved by the Sales Manager before being presented to the customer.**

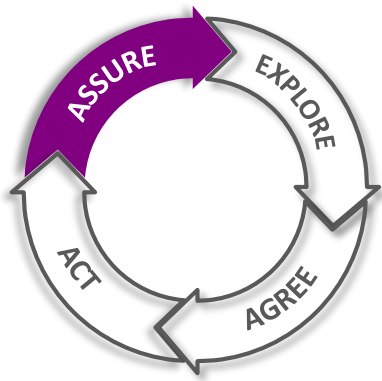
- Say, *“Would you like to proceed with a proposal?”*
- *“Great!, please take a seat whilst I prepare the documentation which should only take.....minutes.*
- *Can I offer you a refreshment?*
- The customer should agree to a specific vehicle before you present a proposal.
- The proposal should recap and detail:
  - Customer details
  - Specific requirements
  - Warranty details and special offers
  - Trade valuation and finance proposal
  - Pricing offer and deposit

INTRODUCE



- **Introduce the customer to a Business Manager if finance is being sought on the vehicle purchase.**
- **Provide a transparent handover**

- Use the customers name.
- Say, *“Let me introduce you to ‘Business Manager’ to review the contract with you”.*
- Business Manager negotiates finance options for new and preowned vehicles in accordance with approved lenders rates.








## STEP #4: ASSURE to confirm and then continue

### ASSURE means:

- Following up and making sure all parties are satisfied with the outcomes.
- Exploring further what needs to be done.
- Revising the plan or changing the standards for fulfillment where required.
- Reviewing what did not go according to plan.
- Asking is there anything we could do differently next time to better improve our service or delivery?



<p style="writing-mode: vertical-rl; transform: rotate(180deg);">ENTER</p>		<ul style="list-style-type: none"> <li>• Enter customer data into the computer system</li> <li>• Make them feel comfortable whilst they wait</li> </ul>	<ul style="list-style-type: none"> <li>• Pre-load customer details into VST system.</li> <li>• Ensure all details are correct.</li> <li>• Provide the customer with a pleasant and comfortable environment whilst they wait.</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">REVIEW</p>		<ul style="list-style-type: none"> <li>• Review contract details with the customer</li> </ul>	<ul style="list-style-type: none"> <li>• Follow up and review all contract details with the customer.</li> <li>• Provide information to the customer regarding relevant paperwork and any authorised documents required.</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">INTRODUCE</p>		<ul style="list-style-type: none"> <li>• Introduce and handover the customer to an Aftercare Consultant</li> <li>• Inform the customer of the timeframe and offer them refreshments whilst they wait</li> </ul>	<ul style="list-style-type: none"> <li>• Explain the role of the Aftercare Consultant.</li> <li>- Say, <i>“Aftercare is your second point of contact. If anything happens and you can’t get in contact with me, ‘aftercare person’ is available to assist you”.</i></li> <li>• Aftercare will assist with the installation of any vehicle equipment, parts and accessories.</li> <li>• They will also plan and organise vehicle delivery.</li> </ul>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>CLOSE</b></p>		<ul style="list-style-type: none"> <li>• <b>Provide the customer with a final handover to the Business Manager to finalise the purchase process</b></li> <li>• <b>Detail timeframe</b></li> <li>• <b>Make sure the commitment is secured</b></li> </ul>	<ul style="list-style-type: none"> <li>• Acknowledge and thank the customer for their patience whilst finalising purchase details.</li> <li>- Say, <i>“We thank you for your patience and sincerely hope you haven’t been inconvenienced in any way whilst we finalise the purchase today.”</i></li> <li>• The Business Manager must:             <ul style="list-style-type: none"> <li>- Reconfirm all contract details</li> <li>- Make any final price adjustments to the contract where required.</li> <li>- Confirm cooling-off period with the customer.</li> <li>- Obtain required signatures from the customer and Sales Manager.</li> <li>- Business Manager secures a holding deposit.</li> <li>- Provide a copy of the contract to the customer.</li> </ul> </li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>FAREWELL</b></p>		<ul style="list-style-type: none"> <li>• <b>Thank and farewell the customer</b></li> <li>• <b>Detail next steps</b></li> </ul>	<ul style="list-style-type: none"> <li>• Business Manager or Sales Consultant must thank the customer.</li> <li>• Shake their hand at all times.</li> <li>- Say, <i>“Thank you for choosing Suttons”</i></li> <li>• Let them know what happens next and who specifically will be in touch with them regarding delivery of their vehicle.</li> <li>• Farewell the customer. <i>“It was our pleasure serving you, have great day”</i></li> </ul>

# CHOOSING A HANDOVER DATE

<b>INFORM</b>		<ul style="list-style-type: none"> <li>• <b>Keep customers informed on the delivery process all the way.</b></li> <li>• <b>Email Customer with pre-delivery checklist and details</b></li> </ul>	<ul style="list-style-type: none"> <li>• Delivery is the customer's special day.</li> <li>• Keep your customer updated on the delivery process at all times.</li> <li>• If the customer calls you first, it's too late.</li> </ul>
<b>PLAN</b>		<ul style="list-style-type: none"> <li>• <b>Ensure everything is prepared for delivery</b></li> <li>• <b>Be organised and complete pre-delivery inspection</b></li> </ul>	<ul style="list-style-type: none"> <li>• Set a confirmed date for delivery.</li> <li>• Tell your customer beforehand to allow at least an hour for delivery on the day.</li> <li>• Make sure the vehicle, paperwork, finance, gift is ready and prepared well in advance.</li> </ul>
<b>DELIVER</b>		<ul style="list-style-type: none"> <li>• <b>Present the vehicle to the customer</b></li> <li>• <b>Follow delivery checklist</b></li> </ul>	<ul style="list-style-type: none"> <li>• Ensure the vehicle is presented well.</li> <li>• Take time to showcase key features of the vehicle and help connect phone with vehicle system.</li> <li>• All paperwork completed correctly.</li> </ul>
<b>ADVISE</b>		<ul style="list-style-type: none"> <li>• <b>Introduce the customer to the Service Department</b></li> <li>• <b>Book complimentary first vehicle inspection</b></li> </ul>	<ul style="list-style-type: none"> <li>• Advise the customer that the dealership will be regularly in touch and explain post delivery process and CVI.</li> <li>• Tell your customer to expect a CSI survey to complete.</li> </ul>