



Suttons

Customer Purchase Experience
TRAINING AND ASSESSMENT GUIDES
SESSIONS 1 & 2

ON-THE-JOB TRAINING SCHEDULE







The following is a training schedule designed to assist you in planning on-the-job training for groups or individuals which outlines the number of training sessions and the topics to be covered within each session.

WEEK 1	EXPLORE	Session 1: <ul style="list-style-type: none"> Taking a Phone Enquiry 	Session 2: <ul style="list-style-type: none"> Welcoming a Walk-in Enquiry Personalising the Service Experience
WEEK 2	AGREE	Session 3: <ul style="list-style-type: none"> Demonstrating the Vehicle 	
WEEK 3		Session 4: <ul style="list-style-type: none"> Appraising the Vehicle 	ACT
WEEK 4		Session 5: Continued <ul style="list-style-type: none"> Experiencing the Vehicle (Test Drive) 	Session 6: <ul style="list-style-type: none"> Checking Out Price and Payments
WEEK 5	ASSURE	Session 7: <ul style="list-style-type: none"> Securing the Vehicle 	Session 8: <ul style="list-style-type: none"> Protecting the Vehicle
WEEK 6		Session 9: <ul style="list-style-type: none"> Choosing a Handover Date 	ASSESS <ul style="list-style-type: none"> Follow up on Skills Assessments Review on-the-job performance

CONDUCTING A TRAINING SESSION

The following is an outline of a training session plan which provides a documented, organised and sequential plan of the actual training session.

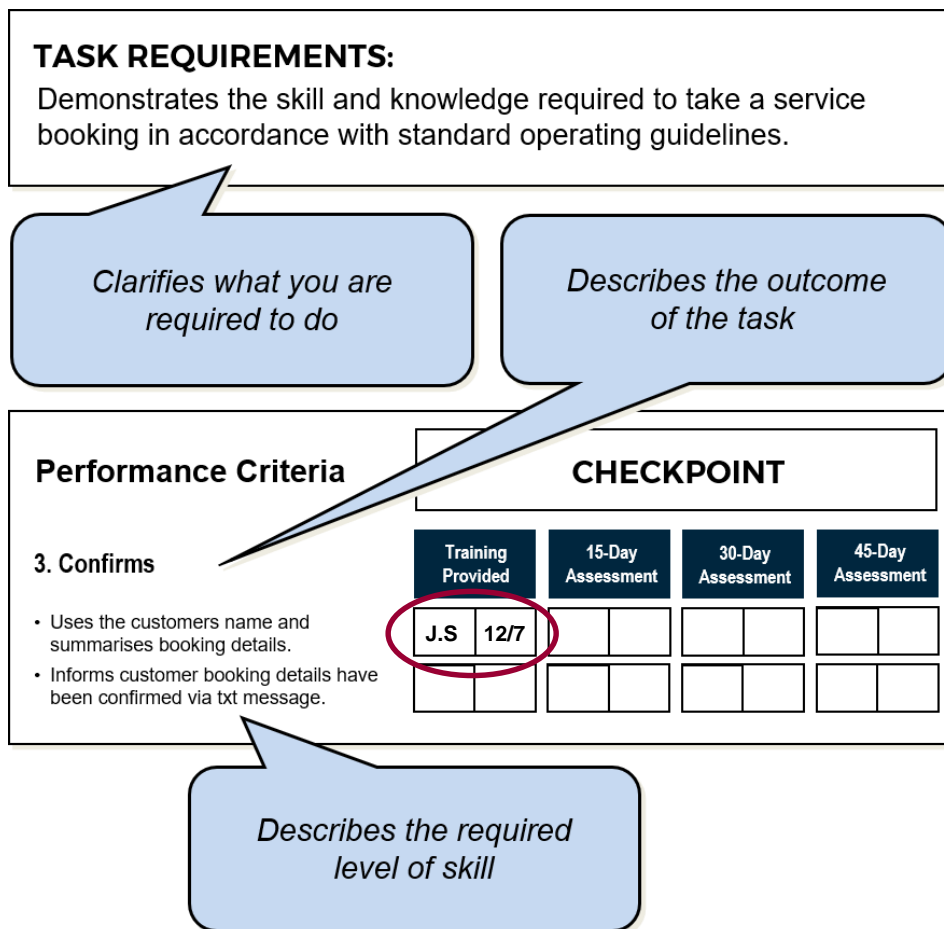
This is a useful format for thinking about the activities and resources you will be required to use in guiding a group or individuals towards a learning objective.

Key Points:		
	<p>Step 1: Define the learning objectives</p>	<ul style="list-style-type: none"> • State the main objectives and outcomes of the session
	<p>Step 2: Clarify key topics and related concepts</p>	<ul style="list-style-type: none"> • Provide an overview of the topics of the session
	<p>Step 3: Organise learning material</p>	<ul style="list-style-type: none"> • Gather materials and make copies of any items that need to be shared
	<p>Step 4: Plan presentation</p>	<ul style="list-style-type: none"> • Promote active learning through use of activities and role plays
	<p>Step 5: Evaluate learning</p>	<ul style="list-style-type: none"> • Use observations, feedback and questionnaires to measure learning
	<p>Step 6: Focus on timing</p>	<ul style="list-style-type: none"> • Establish time priorities and be in control

ASSESSMENT CHECKPOINTS

The overall effectiveness of on-the-job training is depended upon skills assessments at pre-determined checkpoints.

The following processes are designed to identify an individual employees strengths and weaknesses, so that appropriate and corrective action can be taken where required.



Instructions:

- Individual employees will be required to undertake assessments and demonstrate the skills, knowledge and behaviours to achieve competency in the related task skills over a set period.
- An allocated senior member of staff will be required to initial and date where training has been provided to the employee and assess them on-the-job in accordance with the performance criteria outlined at periodical intervals (15, 30, 45 Days).
- Where an employee is deemed not yet competent, additional training and support will be provided to them.
- It is anticipated that at the final assessment checkpoint, the individual employee is able to demonstrate all job specific competencies to the required standards and be deemed competent. Skills assessments will provide the assurance that learning outcomes are being achieved.

TRAINING SESSION PLAN

WEEK 1

Session 1: Explore

How to determine customer needs and gather information from an inbound sales call.



Learning Objectives:

By the end of this session, participants must be able to demonstrate the skills, knowledge and behaviours required to answer inbound sales calls in accordance with standard operating guidelines.



Topics to be covered in this session include:

- Taking a phone enquiry
- Using appropriate language and engaging in dialogue with the customer over the phone
- Confirming agreed actions and closing the call



Learning Materials:

- Copy of Customer Purchase Experience Operating Standards Guide (reference pages 1 – 3)
- Copy of Phonestat
- Hot Sheet



Plan Presentation:

- Review of positive/negative sales calls (Automate)
- Role Play and simulation of incoming sales phone calls
- Discussion and integration of P.R.I.D.E values



Evaluate Learning:

- Demonstration of live calls
- Questions and answers
- Written questionnaire



Timing:

- Allocate 30 minutes for small groups consisting of 2 – 3 people.
- Larger groups will require approximately 45 minutes.

TAKING A PHONE ENQUIRY



TASK REQUIREMENTS:

Demonstrates the skill and knowledge required to answer an inbound telephone call in accordance with standard operating guidelines.

Performance Criteria

CHECKPOINT

1. Answers

- Smiles before taking the call.
- Answers the call within 3 rings.

Training Provided		15-Day Assessment		30-Day Assessment		45-Day Assessment	
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2. Greets

- Sounds warm and welcoming
- Greets the caller with a standard salutation

Training Provided		15-Day Assessment		30-Day Assessment		45-Day Assessment	
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3. Introduces

- Introduces the Dealership and themselves
- Projects enthusiasm

Training Provided		15-Day Assessment		30-Day Assessment		45-Day Assessment	
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4. Listens

- Listen closely to the customer's opening statement and responds accordingly.
- Establishes rapport and uses the customers name

Training Provided		15-Day Assessment		30-Day Assessment		45-Day Assessment	
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DURING THE PHONE ENQUIRY



TASK REQUIREMENTS:

Demonstrates the skill and knowledge required to engage in dialogue with the customer over the telephone in accordance with standard operating guidelines.

Performance Criteria

1. Checks

- Summarises the customer's opening statement.
- Follows Phonestat and asks relevant questions to clarify details.

2. Informs

- Keeps the customer updated and informed at all times between tasks.
- Tells the customer what you are doing throughout the call.

3. Personalises

- Engages and builds rapport with the customer during the call.
- Puts personal touch into the call.

4. Explains

- Advises the caller if required to put them on hold and for how long.
- Thanks the caller for holding.

CHECKPOINT

Training Provided	15-Day Assessment	30-Day Assessment	45-Day Assessment
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ENDING THE PHONE ENQUIRY



TASK REQUIREMENTS:

Demonstrates the skill and knowledge required to close a telephone call with the customer in accordance with standard operating guidelines.

Performance Criteria

CHECKPOINT

1. Recaps

- Provides a brief summary of what has been agreed to with the customer.
- Waits for the customers acknowledgement.

Training Provided	15-Day Assessment	30-Day Assessment	45-Day Assessment
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Confirms

- Confirms next steps
- Confirms with customer appointment calendar invite.

Training Provided	15-Day Assessment	30-Day Assessment	45-Day Assessment
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3. Assures

- Provides own name and offers assurance to the customer to call back if they require any further assistance.

Training Provided	15-Day Assessment	30-Day Assessment	45-Day Assessment
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4. Closes

- Thanks the customer for calling using the standard farewell.
- Lets the customer hang up first and closes the call.

Training Provided	15-Day Assessment	30-Day Assessment	45-Day Assessment
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TRAINING SESSION PLAN

WEEK 1

Session 2: Explore

How to welcome a customer on approach at the Dealership and personalise the customer service experience.



Learning Objectives:

By the end of this session, participants must be able to demonstrate the skills, knowledge and behaviours required to welcome a walk-in customer and personalise the service experience in accordance with standard operating guidelines.



Topics to be covered in this session include:

- Creating a positive first impression (10/5 Rule)
- Using appropriate language and building rapport with the customer face-to-face
- Listening effectively and determining customer needs
- Explaining the Customer Purchase Journey



Learning Materials:

- Copy of Customer Purchase Experience Operating Standards Guide (reference pages 4 – 6)
- Needs analysis pro-forma
- Reference to the Customer Purchase Journey (map)



Plan Presentation:

- Role Play and simulation of face-to-face customer interactions
- Discussion and integration of P.R.I.D.E values



Evaluate Learning:

- Demonstration and observation
- Questions and answers
- Written questionnaire



Timing:

- Allocate 45 minutes for small groups consisting of 2 – 3 people.
- Larger groups will require approximately 1 hour.

WELCOMING A WALK-IN ENQUIRY



TASK REQUIREMENTS:

Demonstrates the skill and knowledge required to meet and greet customers in accordance with standard operating guidelines.

Performance Criteria

1. Meets

- Creates a positive first impression. Makes eye contact and smiles when customer is approaching within (10 feet)

2. Greets

- Greets the customer within (5) feet.
- Uses standard salutation. Is warm and welcoming

3. Introduces

- Introduces the Dealership and themselves
- Shakes hands with everyone and exchanges names.

4. Asks

- Asks the customer how they can assist them
- Listens closely to the customer's opening statement and responds accordingly.
- Redirects or escorts them to the right place and introduces them to the right person if required.

CHECKPOINT

Training Provided		15-Day Assessment		30-Day Assessment		45-Day Assessment	
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PERSONALISING THE SERVICE EXPERIENCE



TASK REQUIREMENTS:

Demonstrates the skill and knowledge required to personalise the customer service experience in accordance with standard operating guidelines.

Performance Criteria

CHECKPOINT

1. Invites

- Makes the customer feel comfortable and offers them refreshments
- Details location of amenities and facilities

Training Provided		15-Day Assessment		30-Day Assessment		45-Day Assessment	
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2. Determines

- Conducts an analysis to determine the required needs of the customer (what, why, how, when)
- Takes notes and listens closely to the customers needs

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3. Clarifies

- Clarifies information and summarises findings
- Lets the customer know that you can offer them a tailored solution based on their needs and information provided.

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4. Outlines

- Explains and outlines the customer in-store purchase journey
- Sets customer expectation and details timeframe

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