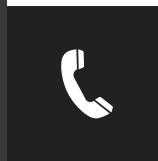




INBOUND & OUTBOUND PHONE CALL CHEAT SHEETS

The fastest and easiest way for dealers to increase their bottom line is to get better on the phone. Phone scripts are a good start, but exceptional phone skills are what set dealer groups apart from the competition. At Call Box, we use a simple method called *CRISP* to illustrate the most important metrics for a solid phone process. CRISP stands for Connect, Request and Invite, Set, and Pursue.

These cheat sheets will help your Sales Associates be CRISP when handling any inbound or outbound sales calls over the phone.



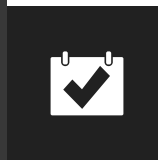
CONNECT

CRISP Sales Associates hate voicemail. Picking up the phone is their top priority, so you can always count on them to never leave a caller stranded.



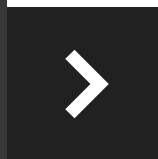
REQUEST & INVITE

CRISP Sales Associates consistently request the most appointments. They also average a booking rate of **90%** on all qualified buyers because they build great rapport from the moment the phone is answered.



SET

CRISP Sales Associates don't settle for loose commitments. They always push to set firm appointments for all qualified buyers. If an appointment isn't booked, the Sales Associate continuously follows up until the caller agrees on a specific date and time.



PURSUE

CRISP Sales Associates are constantly reaching out to established customers and new leads to rescue stranded calls and save missed appointment opportunities.

INBOUND CHEAT SHEET

HOW TO OWN THE PHONE

when

New lead calls in

INTRODUCE AND COLLECT CALLER'S INFORMATION

"Thank you for calling _____, my name is _____. How may I help you?"

Caller's name (make sure to repeat customer name throughout the entire call) _____

Phone number _____ Email (if applicable) _____



VETTING THE CUSTOMER AS A QUALIFIED BUYER

"Have you ever purchased a truck before or are you a first-time buyer?" Yes No

"How much are you planning on putting down as a down payment?" \$ _____

"What does your credit score look like?" Credit Score _____



FACT FINDING: WHAT ARE THEY LOOKING FOR?

"You've called the right place. I'm going to do everything I can to make sure we get you in the perfect truck. Is there a particular unit you are interested in?"

Unit inquiring about _____ Other models? (never limit inventory) _____

Desired unit specifications _____



REQUEST AND SET THE APPOINTMENT

"Is there anything else we need to consider before we bring you in for a test drive?"

Yes _____ No (address the concern and then option close)

OPTION CLOSE: "I have an opening at _____ and _____. Does one of those work for you?"

Firm appointment set for _____ at _____ a.m./p.m.

Soft appointment for _____ a.m./p.m.

"I'll give you a call tomorrow to see if you've narrowed down a time you can come in. Would it be better for me to call tomorrow morning or afternoon?"

Follow up on _____ at _____ a.m./p.m. to firm up time.

Declined. "If we get something in that you might be interested in, can I give you a call back?"



CLOSE

"Thank you caller's name. I will see you on _____ at _____. When you get here, come straight to _____ where in the store and ask for who is their appt with. Again, my name is _____ and you can contact me directly at direct phone number. Should anything come up before then, please don't hesitate to call me."

- Thank the caller.
- Provide directions to the store if needed.
- Provide instructions for what the caller should do upon arrival.
- Give your contact information should something change.

OUTBOUND CHEAT SHEET

HOW TO SALVAGE MISSED OPPORTUNITIES

when

Never connected

Left message

Didn't leave message

INTRODUCTION

Hi, my name is _____. I am a _____ at _____. We missed a call from this number and I want to make sure we get you taken care of. How can I help you today?

IF THEIR NEEDS WERE ALREADY TAKEN CARE OF AT ANOTHER STORE

"I want to thank you for calling in. We have a wonderful service department so please keep us in mind for any assistance or services you may need down the road, we'll be happy to take care of you."

IF CALLING FOR TRUCK INFORMATION

"I would be happy to get you all the information you need about the truck you are interested in. Let's go ahead and clarify some of your preferences."

- What are his/her desired truck specifications?
- Is he/she interested in any other models?

REQUEST AND SET THE APPOINTMENT

"I have an opening at _____ and _____. Does one of those work for you?"

FIRM APPOINTMENT set for _____ at _____ a.m./p.m.

SOFT APPOINTMENT set for _____ at _____ a.m./p.m.

"I'll give you a call tomorrow to see if you've narrowed down a time you can come in."

"Would it be better for me to call tomorrow morning or afternoon?"

"Follow up on _____ at _____ a.m./p.m. to firm up time."

DECLINED "If we get something in that I think you might be interested in, can I give you a call back?"

CLOSE

"Thank you caller's name. I will see you on _____ at _____. When you get here, come straight to _____ where in the store and ask for who is their appt with. Again, my name is _____ and you can contact me directly at direct phone number. Should anything come up before then, please don't hesitate to call me."

- Thank the caller.
- Provide directions to the store if needed.
- Provide instructions for what the caller should do upon arrival.
- Give your contact information should something change.

OUTBOUND CHEAT SHEET

HOW TO SAVE LEADS

when

No appointment request

No firm appointment set

IF FOLLOWING UP ON A CUSTOMER WHO WAS NOT OFFERED AN APPOINTMENT

IF FOLLOWING UP ON A CUSTOMER WHO SET SOFT DATE/TIME

INTRODUCTION

"Hi, my name is your name. I am a your position at store name. I noticed we didn't set you up to come in for a test drive."

"We have some VIP appointments available this week and wanted to see if one of those would work for you to come in?"

INTRODUCTION

"Hi, my name is your name. I am a your position at store name. You mentioned you would be able to swing by the store sometime on . I want to make sure we get you set up for a quick and efficient visit."

"Let's narrow down a time for you to come in."

REQUEST AND SET THE APPOINTMENT

"I have an opening at and . Does one of those work for you?"

FIRM APPOINTMENT set for at a.m./p.m.

SOFT APPOINTMENT set for at a.m./p.m.

"I'll give you a call tomorrow to see if you've narrowed down a time you can come in."

"Would it be better for me to call tomorrow morning or afternoon?"

"Follow up on at a.m./p.m. to firm up time."

DECLINED "If we get something in that I think you might be interested in, can I give you a call back? Is this the best number to reach you at?"

REQUEST AND SET THE APPOINTMENT

"I have an opening at and . Does one of those work for you?"

FIRM APPOINTMENT set for at a.m./p.m.

DECLINED "If we get something in that you might be interested in, can I give you a call back? Is this the best number to reach you at?"

CLOSE

"Thank you caller's name. I will see you on at . When you get here, come straight to where in the store and ask for who is their appt with. Again, my name is and you can contact me directly at direct phone number. Should anything come up before then, please don't hesitate to call me."

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