

Buy and Book Observation Checklist

Observed by _____

Date _____

SET UP THE WIN: Prepare for BOPIS / Web Customers		✓	Comments
MARKETING ASSISTANT MANAGER: _____			
Observe, review open orders, and ask appropriate questions:			
Assigns a Sales Associate every day to prepare for BOPIS and other web customers and to communicate with the Service Coordinator.			
Ensures that assigned Sales Associate: Checks orders at the start of day and monitors orders hourly throughout the day. Checks invoice for certificates, and flags in the BOPIS notes page if not purchased.			
Orders out of stock product, using the Purchase Decision Tree and following Special Order Best Practices.			
Calls customer immediately and lets them know the status of their order.			
Communicates all actions taken using the Notes field in the POS to keep all employees informed on incoming BOPIS and web orders.			
Verifies that product for each order is pulled and staged before customer arrives.			
Positions the pit stop sign and product for each BOPIS customer with an appointment 15 minutes before the appointment.			
Communicates the appointment to the appropriate Service Coordinator.			
DELIVER INVITING, EASY, & SAFE CUSTOMER EXPERIENCE: (BOPIS)		✓	Comments
SALES ASSOCIATE: _____			
Identified the BOPIS customer immediately.			
“Be Bruce-Like” Did the Trusted Expert show that they cared?			
Greeted customer: <ul style="list-style-type: none"> Smiled, made eye contact, and introduced themselves to the customer. Genuine, sincere, humble, and polite. 			
Made the customer feel welcome and cared for, set expectations for the visit, and accompanied the customer to a designated parking spot or service bay.			
Used the mobility device to capture the customer’s name, vehicle year, make, model, immediate need, and appointment.			
Asked open ended questions and listened carefully. <ul style="list-style-type: none"> How was your web experience? Do you have any questions about your order? Shares the value of the DT certificate if not purchased from web. 			
Reviewed order details and validated fitment.			
Used mobility device to perform a complete VTV and wiper blade inspection and shared any safety concerns.			
Was the product staged and ready? Yes / No <input type="checkbox"/> Pit stop Experience <input type="checkbox"/> Next in Bay			
Verified the customer’s or alternate recipient’s ID when finalizing the invoice.			
Thanked the customer and reassured them they made the right choice.			
Provided the customer an accurate promise time.			