

SALES PROGRAM

SL3 Observation

“Our First Consideration is the Safety of the Customer”

Use this Observation form to evaluate the skills learned in SL3:

1. Demonstration of consistent execution of CES and ETV
2. Proper usage of tools and software (Fitment Validation, offering DTC and Sunbit financing, Supporting B2B/Fleet customers, and reporting incidents)
3. Improved and consistent demonstration of all skills learned in SL1, 2, and 3

Customer Experience Strategy

PHASE 1 - INVITING: Build the Relationship	✓	Comments
“Be Bruce-Like” Did the Trusted Expert showed that they cared? <ul style="list-style-type: none">• Smiled, made eye contact, and introduced themselves to the customer.• Asked the customer’s name and started the conversation.• Genuine, sincere, humble, and polite.		
How well did the Trusted Expert listen with their mind and their heart to identify the customer’s immediate and true need(s)? <ul style="list-style-type: none">• Faced the customer during conversation and demonstrated empathy.• Asked open-ended questions to build relationship and learn about customer’s research and needs. If applicable, identified fleet customers.• Listened carefully to the customer.		
While conducting the VTV, did the Trusted Expert capture information and identify the customer’s driving priorities? <ul style="list-style-type: none">• Engaged in conversation with customer while conducting the VTV and used mobility device to capture customer first and last name, email and/or phone #.• Asked follow-up questions, as needed, to learn about other needs, including brand preferences, wiper blades, a desire for aftermarket wheels, and/or accessories.		
Mobility Device <ul style="list-style-type: none">• Accurately captured tread depth, DOT and VIN. If applicable, collects additional required information for Fleet customers• Performed complete assembly inspection from the center cap outward. Assembly Inspections <ul style="list-style-type: none">• Performs complete inspections from the center cap outward.• Confidently speaks to the 5 sections we inspect and what we look for		

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PHASE 2 - EASY: Empower the Customer	✓	Comments
<p>“Keep it simple”</p> <p>How well did the Trusted Expert educate and empower the customer with the information they need to make an informed and safe decision?</p> <ul style="list-style-type: none">• Shared findings from the VTV in a genuine and caring way.• Used the Know Your Numbers board to explain both tread depth and tire age for the customer's current tires, and how they relate to safety.• Used other customer lounge tools when applicable.		
Used Tires		
<ul style="list-style-type: none">• Understands the standards that must be met to be accepted for resale.		
Repairing the injury		
<ul style="list-style-type: none">• Injuries: Understands and can speak to what can and can not be repaired.• Acknowledged the immediate need and asked permission to make a recommendation that addresses the true need.• Kept customers safe by recommending tires at 4/32 and/or 6 years or older every time.		

PHASE 3 - SAFE: Personalize the Recommendation	✓	Comments
POS		
<ul style="list-style-type: none">• Overview - Explained what the left-side menu items and Invoice Sales screen tiles are used for.• Creates and edits customer records• Explained our 3 customer types and can look up customer history• If applicable, looks up B2B/Fleet customers accurately using A/R Customers Only option and reads Rates and Rules• Can convert BOPIS, WEB and Appointments to invoices• Can create invoices for purchases and free services• Can finalize invoices and explain the journey tracker		
Fitment		
<ul style="list-style-type: none">• Entered vehicle with correct year, make, model and trim package.• Verified tires meet load and rim width requirements• Verified wheels have correct load rating and bolt pattern• Used the Fitment Guide to find and validate the correct wheel and accessories using the POS and Fitment Calculator on KC		
Treadwell, Tire Performance, Tire Design		
<ul style="list-style-type: none">• Understands Treadwell, its purpose and where the data comes from.• Knows what the three personas are and how to identify a customers persona• Understands advantages and disadvantages of every tire. Explains common design compromises and trade-offs.• Distinguishes difference between all tire types and understands the performance expectations, pros and cons of each.		

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Did the Trusted Expert involve the customer in the recommendation?		
• Went through Treadwell together with the customer.		
• Selected the appropriate persona for the customer based on what was learned about their driving habits.		
• Presented one personalized recommendation with certificates.		
• Demonstrated respect by pausing and providing the customer opportunity to consider the recommendation. (Asked the customer what they think)		
Did the Trusted Expert overcome objections (if applicable)?		
• Listened and addressed objections appropriately (including getting the manager involved, if needed) .		
• Made every effort to provide a solution to earn the customer's business: used compare and contrast, in-store mail-in rebates, Discount Tire financing, trade-in, shop competition.		
Sales Promotions		
• Can locate promotions, rebate forms, and QRG on the KC		
• Offers promotions when appropriate		
• Accurately Finalizes invoice with a sales promotion following QRG		
Did the Trusted Expert finalize the transaction and set expectations?		
• Offered Discount Tire financing – both DTC(Primary) and Sunbit (secondary)		
• Can locate DTC and Sunbit QRG's on the KC		
• Thanked the customer and reassured them they made the right choice.		
• Reviewed the invoice or work order with the customer.		
• Provided the customer an accurate promise time.		
• Answered any remaining questions.		

Working around Moving vehicles	✓	Comments
• Safely guides vehicles into and out of the service bays		
• Uses proper hand signals and eye contact while standing to the side		

Pulling Stock	✓	Comments
• Accurately identifies and pulls tires, wheels TPMS rebuild kits from invoice.		

BOPIS, Appointments, Pit Stop Experience, Next in Bay	✓	Comments
• Understands customer expectations, where to locate orders in POS, and how to contact customers. (Refers to QRG and Best Practice when needed)		
• Executes Pit Stop experience accurately		
• Executes Next in Bay Experience accurately.		

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Special Orders, STOs, POs	✓	Comments
• Can locate Best Practice and follow CTQ steps.		
• Can accurately create, manage, receive and contact customers regarding special orders.		
• Can locate and follow the Tire and Wheel purchase decision trees		

Incident Reporting	✓	Comments
• Accurately files reports (Incident/Claim/Close Call) from the Claims page on the KC		
• Follows the Incident Reporting Portal QRG when needed		

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Earn the Visit

Greeting and Name Exchange	✓	Comments
<ul style="list-style-type: none">• Be prepared to answer the call		
<ul style="list-style-type: none">• Personalized, professional greeting with energy, enthusiasm, and empathy or excitement		
<ul style="list-style-type: none">• Identify and acknowledge the reason why they are calling (immediate need)		

Addressing the Immediate Need	✓	Comments
<ul style="list-style-type: none">• Ask if the customer has done business with us before and thank them		
<ul style="list-style-type: none">• Gather vehicle information (Year, Make, Model, and trim using fitment guide to verify correct tire size)		
<ul style="list-style-type: none">• Share the value of doing business with us (competitive advantages) while looking up what the customer is calling about (Ex: With every tire purchase we give you free services nationwide - flat repair, rotations, rebalancing, air checks, tire pressure monitoring system resets, free wiper blade inspections, and pro-rated road hazard)		
<ul style="list-style-type: none">• Find out when they want to make a purchase or have service performed		
<ul style="list-style-type: none">• Identify where the customer is on their journey. (ex: asked if customer has researched any product, shopped around, or has a price or brand in mind)		

Personalizing the Experience	✓	Comments
<ul style="list-style-type: none">• If the customer wants a particular brand, provide a price quote, and promise we will beat any price on that tire		
<ul style="list-style-type: none">• Quote the lowest price for customer's size and fitment		
<ul style="list-style-type: none">• Ensure the customer understands we will beat any price (Ex: If you shopped around before calling us, we will beat that price – period)		
<ul style="list-style-type: none">• Share personalized benefits of DTC: Pick 1 or 2 things that YOU believe set us apart from the competition (other than price) (Ex: Treadwell data, get 30% shorter average wait time when you buy and book online, using our phone app to save time and check in from home)		

Ending the Call	✓	Comments
<ul style="list-style-type: none">• Make sure you have answered all their questions		
<ul style="list-style-type: none">• Invite the customer to the store. Offer appointments to customers who ask, NOT to gain the commitment.		
<ul style="list-style-type: none">• Give the specific store location, landmarks, and when we expect them to come in		
<ul style="list-style-type: none">• Restate your name and let them know to ask for you when they arrive		
<ul style="list-style-type: none">• Let them know what to expect when they arrive at your store (ex: Meet the greeter if applicable)		
<ul style="list-style-type: none">• Thank them by name for calling and the opportunity to earn their business		