

# 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
<b>"Be Bruce-Like" Did the Trusted Expert showed that they cared?</b>		
• Smiled, made eye contact, and introduced themselves to the customer.		
• Asked the customer's name and started the conversation.		
• Genuine, sincere, humble, and polite.		
<b>How well did the Trusted Expert listen with their mind and their heart to identify the customer's immediate and true need(s)?</b>		
• 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.		
<b>While conducting the VTV, did the Trusted Expert capture information and identify the customer's driving priorities?</b>		
• 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, <b>wiper blades</b> , a desire for aftermarket wheels, and/or accessories.		
<b>Mobility Device</b>		
• 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.		
<b>• Assembly Inspections</b>		
• 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
<b>"Keep it simple"</b>			
<b>How well did the Trusted Expert educate and empower the customer with the information they need to make an informed and safe decision?</b>			
<ul style="list-style-type: none"> <li>Shared findings from the VTV in a genuine and caring way.</li> </ul>			
<ul style="list-style-type: none"> <li>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.</li> </ul>			
<ul style="list-style-type: none"> <li>Used other customer lounge tools when applicable.</li> </ul>			
<b>Used Tires</b>			
<ul style="list-style-type: none"> <li>Understands the standards that must be met to be accepted for resale.</li> </ul>			
<b>Repairing the injury</b>			
<ul style="list-style-type: none"> <li>Injuries: Understands and can speak to what can and can not be repaired.</li> </ul>			
<ul style="list-style-type: none"> <li>Acknowledged the immediate need and asked permission to make a recommendation that addresses the true need.</li> </ul>			
<ul style="list-style-type: none"> <li>Kept customers safe by recommending tires at 4/32 and/or 6 years or older every time.</li> </ul>			

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

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<b>Did the Trusted Expert involve the customer in the recommendation?</b>		
• 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)		
<b>Did the Trusted Expert overcome objections (if applicable)?</b>		
• 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.		
<b>Sales Promotions</b>		
• Can locate promotions, rebate forms, and QRG on the KC		
• Offers promotions when appropriate		
• Accurately Finalizes invoice with a sales promotion following QRG		
<b>Did the Trusted Expert finalize the transaction and set expectations?</b>		
• 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.		

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

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

<b>BOPIS, Appointments, Pit Stop Experience, Next in Bay</b>	✓	<b>Comments</b>
• 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"> <li>Be prepared to answer the call</li> </ul>		
<ul style="list-style-type: none"> <li>Personalized, professional greeting with energy, enthusiasm, and empathy or excitement</li> </ul>		
<ul style="list-style-type: none"> <li>Identify and acknowledge the reason why they are calling (immediate need)</li> </ul>		

Addressing the Immediate Need	✓	Comments
<ul style="list-style-type: none"> <li>Ask if the customer has done business with us before and <b>thank them</b></li> </ul>		
<ul style="list-style-type: none"> <li>Gather vehicle information (<i>Year, Make, Model, and trim using fitment guide to verify correct tire size</i>)</li> </ul>		
<ul style="list-style-type: none"> <li>Share the value of doing business with us (competitive advantages) while looking up what the customer is calling about (<i>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</i>)</li> </ul>		
<ul style="list-style-type: none"> <li>Find out when they want to make a purchase or have service performed</li> </ul>		
<ul style="list-style-type: none"> <li>Identify where the customer is on their journey. (<i>ex: asked if customer has researched any product, shopped around, or has a price or brand in mind</i>)</li> </ul>		

Personalizing the Experience	✓	Comments
<ul style="list-style-type: none"> <li>If the customer wants a particular brand, provide a price quote, and promise we will beat any price on that tire</li> </ul>		
<ul style="list-style-type: none"> <li>Quote the lowest price for customer's size and fitment</li> </ul>		
<ul style="list-style-type: none"> <li>Ensure the customer understands <b>we will beat any price</b> (<i>Ex: If you shopped around before calling us, we will beat that price – period</i>)</li> </ul>		
<ul style="list-style-type: none"> <li>Share personalized benefits of DTC: Pick 1 or 2 things that <b>YOU</b> believe set us apart from the competition (other than price) (<i>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</i>)</li> </ul>		

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