

Before the Next Pencil

A conversation guide for the salesperson and the manager.

Start with the deal in front of the customer.

Put the pencil where the customer can see it. Explain each applicable item; identify estimates and anything still subject to approval.

- ☐ Vehicle and selling price
- ☐ Taxes and itemized fees
- ☐ Optional products: choice, price, and payment effect
- ☐ Trade allowance, payoff, and resulting equity
- ☐ Cash down and amount financed
- ☐ Rate, term, and payment; what changed from the online estimate

Find the part that still needs an answer.

"Which part of these numbers doesn't match what you expected?"

"Is that more than you want to spend each month, or different from the payment you expected coming in?"

"We started with the online estimate. Are the differences between that estimate and this payment clear, or should we go through one of them again?"

"What are you comparing this price with?"

Customer's words / the issue to resolve:

Before the manager changes the number:

What did the customer say? How did the salesperson answer? What is this concession supposed to solve?

When the questions are answered: "Does this work for you, and are you ready to move forward?"

Customer Callback Worksheet

One sheet per conversation. Offer \$50 for ten minutes; listen before explaining.

Customer / CRM ID: _____ Visit date: _____ Call date: _____

Interviewer: _____ CRM reason for lost sale: _____

Opening you can use

"I want to understand your visit and what led you to buy somewhere else. Would you spend ten minutes on the phone with me? I will send you a \$50 gift card afterward as a thank-you, whatever your feedback."

1. Ask about the visit.

"Was there anything about our pricing or process that you couldn't get a clear answer on?"

2. Ask about the dealership they chose.

"What did the dealership you chose do better for you?"

Follow the answer; avoid suggesting a problem.

"Can you walk me through that part?" "What happened next?" "What would have helped?" If they have not bought, ask: "What are you still trying to decide?"

Moment / step in the visit to check:

Call complete: _____ Gift card sent: _____ Sent by: _____

Send the gift card regardless of praise or criticism. Do not tie it to a review or a purchase. Keep customer wording separate from your interpretation; check details after the call.

Turn the Calls Into a Change

Use with ten completed callbacks. The goal is a better experience for the next customer.

Manager: _____ Calls completed: _____ Review date: _____

Call	CRM reason	Customer words / visit step	What to check
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

What repeated, and in how many completed calls?

Check the quote, appraisal, timeline, and team explanation. Ten calls describe this group; they do not establish a dealership-wide rate or prove a cause.

One change for the next customers:

Person responsible: _____ Start date: _____

How will you check whether customers felt the change?

Name what you will observe and the question you will ask later customers.

Follow-up date: _____ Result / next adjustment: _____

Owner discussion: the repeated issue, supporting examples, proposed change, cost, and check date.

Delivery-to-Arrival Worksheet

Trace a real visit backward. Record what happened, including the waiting.

Deal / CRM ID: _____ Date: _____ Manager: _____

Arrival time: _____ Delivery time: _____ Total elapsed minutes: _____

Work backward from delivery. Add sheets if needed; use the actual sequence, not the process manual. Mark estimated times. Overlapping steps must not be added twice.

Step (last to first)	Start / finish	Owner	Customer doing / waiting for
Delivery			
Arrival / greeting			

Include: delivery prep, signing, F&I, finance wait, agreement, each pencil, appraisal, demo, vehicle selection, discovery, and greeting. Some will overlap or occur in a different order.

Where could work start sooner, happen once, or pass to someone sooner?

Change: _____ Owner: _____ Start: _____

For waits that remain, agree on the update.

Who returns to the customer? _____ At what time? _____ Who covers? _____

Compare later visits: elapsed time, idle minutes, and customer feedback. Track reviews and F&I acceptance separately; a change in those results alone does not prove shorter waits caused it.

Review date: _____ What improved / still needs work: _____