

## CALL MONITORING SCORECARD: OUTBOUND PREVIOUS PURCHASE OR LEASE (EQUITY MINING)

REP NAME: \_\_\_\_\_ DATE OF CALL: \_\_\_\_\_  
MANAGER: \_\_\_\_\_ DATE REVIEWED: \_\_\_\_\_  
DESIRED VEHICLE: \_\_\_\_\_ CUSTOMER: \_\_\_\_\_

SCORING RUBRIC: N/A On this call | 0 Did not do | 1 Unsatisfactory | 2 Satisfactory | 3 Outstanding  
Give each area a score between 1-3.

— **QUALIFY THE CURRENT VEHICLE**

Does the rep ask for current miles and overall condition of current vehicle?

— **PRESENT THE OPPORTUNITY**

Does the rep present your "current situation"? Does the rep "Hook the Trade" or lease equity appraisal?

— **WOULD YOU AT LEAST CONSIDER? (rep should pause and wait for answer)**

Does the rep attempt to close the customer on considering the opportunity?

— **SET FIRM APPOINTMENT**

Does the rep attempt to set a specific appointment for a trade or lease equity appraisal?

— **UPDATE DRIVERS OR ASK FOR REFERRALS**

Does the rep update current drivers in the household or ask for referrals?

— **END THE CALL WITH A BENEFIT**

Does the rep end the call with a benefit to the customer? "The most important thing is..." list dealership perks or advantages to buying from you.

— **TOTAL SCORE (Max Score=18)**

### Recommendations for Sales Rep:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



Salesperson's Name: \_\_\_\_\_

Customer Name: \_\_\_\_\_

Date of Call: \_\_\_\_\_

Desired Vehicle: \_\_\_\_\_

**Control**

Who is guiding the conversation and asking the questions? Was the P.A.C technique used?

**Selling the Sizzle**

Does the rep express enthusiasm? Do they attempt to get the shopper excited about the vehicle or dealership experience? (I.e The test drive or the benefits of doing business with you and your dealership)

**Opening Up Inventory Options**

Does the rep "open up" the shopper to other available choices including other models, model years, pre-owned, cpo or pre-order options?

**Trade**

Does the rep proactively bring up the trade-in? Does the rep tell a good story/create a demand to see their current vehicle by "hooking the trade"

**Whether You Buy From Us or Not**

Does the rep offer the option to buy their trade, regardless of where the shopper chooses to purchase their vehicle?

**Attempt to Set a Specific Appointment**

Does the rep attempt to set a *specific* appointment with a date and time?

**\*\*Bonus Questions - 1 Point Each\*\*****Echoing**

Does the rep actively listen & engage the shopper by echoing the shoppers responses?

**Texas Yes**

Does the rep offer to prepare the vehicle(s) for the shopper to test drive, anticipating the shopper's visit?

Total [ Max Score= 18 ]

Notes:

**SCORING RUBRIC**

N/A Not applicable on this call

0 Did not do

1 Unsatisfactory

2 Satisfactory

3 Outstanding!

Coached By:

Coaching Date: