

Bringing the Business Office to the Virtual Customer

By Tony Dupaquier



There are a growing number of individuals conducting business over the Internet. It is important to have practices and procedures in place to handle these types of transactions. I will inform you on how to secure sales and protect front-end gross profit without meeting the customer face-to-face.

Contrary to prior beliefs, it is possible to have a profitable transaction without the customer physically visiting the business office. One key item to remember is that the business manager needs to speak with the customer over the phone. In order to make this happen, I suggest having the salesperson or sales manager inform customers that, in order to finalize the transaction, the business manager must speak with the purchaser. While the salesperson or sales manager is on the phone, have him/her set up a 15-minute phone appointment for the business manager to complete the required paperwork. Make sure the customer can receive e-mails that pertain to the topic at hand. A good tip to remember is to set appointments on the quarter hour, such as 10:15 AM or 10:45 AM. By setting the appointment at an odd time, it increases the likelihood of the customer remembering the scheduled appointment.

The Phone Appointment

When working with a customer over the phone, follow the same procedures as if he/she were in the business office. Start the conversation with introductions by stating the responsibilities of the business manager and letting the customer know it should take approximately 15 minutes

to complete the paperwork. Verify that the customer has Internet access and time to complete the documents.

After completing the introduction, move on to the basic interview questions. This phase of the appointment is an excellent time to begin building rapport with the customer. Start the conversation by asking the customer about his/her driving habits and choice of vehicle. If there is a trade-in, proceed with the trade-in questions. If the customer is not trading a vehicle, ask about his/her previous vehicle.

Once all of the information on the vehicle has been gathered, verify all information listed on the customer statement. Be sure to ask all of the pertinent questions to create need for the products the dealership has to offer. Verbally review the manufacturer's limited warranty and perform the trial close based on the time and mileage the customer will be driving the vehicle.

Next, create the menu. When creating the menu, be sure to include the appropriate benefits that the customer needs to take into consideration with the purchase of the new vehicle. When finished, save the document and e-mail the menu to the customer. Verify that the customer has received the e-mail and can open the attachment. Once the customer opens the menu, discuss the menu in its entirety while reviewing all required disclosures. Repeat the same process for the waiver once the customer has selected a package.

When the verbal transaction has been completed, it is necessary to send all paperwork and contracts to the customer. Sending contracts outside of the dealership for customer signatures can create risks. Therefore, make sure that the business manager and the dealership make a reasonable effort to ensure legal compliance and protect the customer's identity.



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In all situations, it is highly advised that a customer comes to the dealership to sign the documents. If the customer is unable to come to the dealership, send the paperwork in an overnight envelope to a specialty packaging and shipping business that is close to the customer's home or business. Many times, these establishments will have a notary public available to customers. A notary will ensure the identity of the person signing the contracts. To take advantage of this service, simply contact the business ahead of time, find out how much the notary's services cost, and include a check in the envelope to pay for the services. An added bonus to using this practice is the customer is able to send the documents back to the dealership immediately.

Customers who use the Internet to purchase vehicles enjoy the simplified process that technology offers. As more customers embrace this method, the need to cater to these buyers becomes even greater. By making a few adjustments in the presentation to accommodate virtual customers, the business manager will greatly increase the ability to sell to this market segment.

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