Customer Touchpoint Objectives

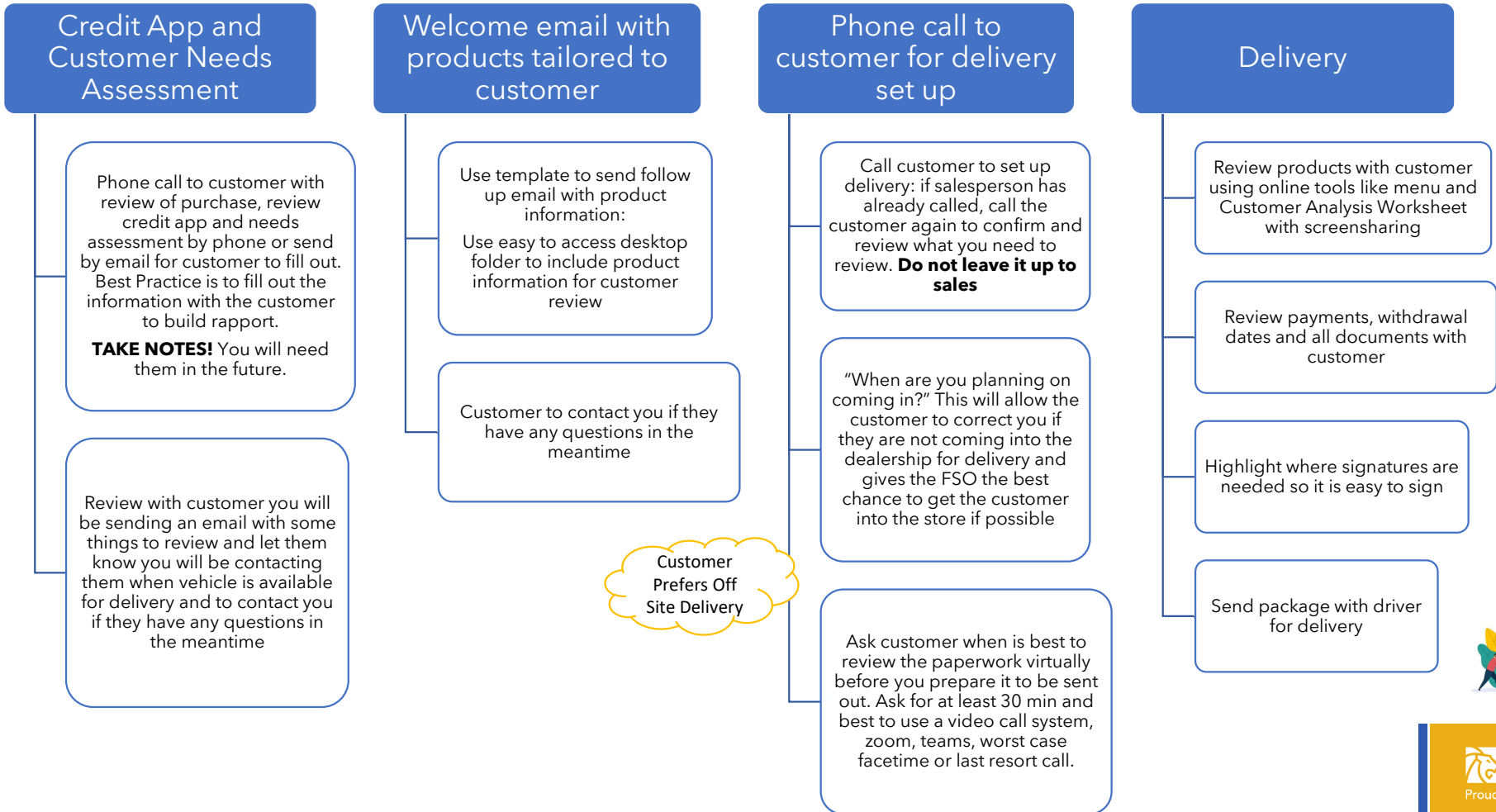| Credit App and Customer Needs Assessment	Welcome email with products tailored to customer	Phone call to customer for delivery set up	Delivery
Objective: To build rapport with customer, gather information for bank and product ranking and set expectation of process	Objective: Layout timeline and next steps. Introduce protections and open communication channel for customer questions/interactions	Objective: Set up and confirm delivery time/location. Set time expectations. Give details for car insurance (by province). Confirm physical applications needed on vehicle.	Objective: Review protections, complete required documentation.

Steps to Success: All virtual

| Credit App and Customer Needs Assessment | Welcome email with products tailored to customer | Phone call to customer for delivery set up | Delivery |

Credit App and Customer Needs Assessment

Phone call to customer with review of purchase, review credit app and needs assessment by phone or send by email for customer to fill out. Best Practice is to fill out the information with the customer to build rapport.
TAKE NOTES! You will need them in the future.

Review with customer you will be sending an email with some things to review and let them know you will be contacting them when vehicle is available for delivery and to contact you if they have any questions in the meantime

Welcome email with products tailored to customer

Use template to send follow up email with product information:
Use easy to access desktop folder to include product information for customer review

Customer to contact you if they have any questions in the meantime

Phone call to customer for delivery set up

Call customer to set up delivery: if salesperson has already called, call the customer again to confirm and review what you need to review. **Do not leave it up to sales**

"When are you planning on coming in?" This will allow the customer to correct you if they are not coming into the dealership for delivery and gives the FSO the best chance to get the customer into the store if possible

Customer Prefers Off Site Delivery

Ask customer when is best to review the paperwork virtually before you prepare it to be sent out. Ask for at least 30 min and best to use a video call system, zoom, teams, worst case facetime or last resort call.

Delivery

Review products with customer using online tools like menu and Customer Analysis Worksheet with screensharing

Review payments, withdrawal dates and all documents with customer

Highlight where signatures are needed so it is easy to sign

Send package with driver for delivery

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Steps to Success: All in store

Credit App and Customer Needs Assessment

Sit down with customer with review of purchase, review credit app and needs assessment. Best Practice is to fill out the information with the customer to build rapport. **TAKE NOTES!** You will need them in the future.

Review with customer you will be sending an email with some things to review and let them know you will be contacting them when vehicle is available for delivery and to contact you if they have any questions in the meantime

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Customer Prefers On Site Delivery

Ask customer when is best to review the paperwork. Book appointment. Prepare the customer that they will need at least 30 min with you and then more time to go over their new vehicle

Delivery

When customer arrives have salesperson show them their new vehicle. It will be the first time they have seen it, get them excited!

Bring customer to finance office

Review products with customer using online tools like menu and Customer Analysis Worksheet with screensharing

Review payments, withdrawal dates and all documents with customer

Sign Documents

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