



GUEST SHEET CERTIFICATION

TEAM MEMBER NAME:

Shottenkirk
AUTOMOTIVE GROUP

(v. 120125)

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Objective

At the Shottenkirk Automotive Group, we believe that the primary key to a successful sales transaction is the proper completion of the customer Guest Sheet. The information gathered on this sheet during your conversation with the customer(s) will have more of a direct impact on your closing percentage than any other document in the entire car deal. Not only will the right information drive closing but it will also result in optimizing the gross potential of the deal. **Simply said, a world-class Guest Sheet will result in you selling more cars and making more commission.** The best of the best stay laser focused on the Guest Sheet.

This document will walk you through the very basics of how to perform an effective Guest Sheet. This will teach you the actual word tracks of what to ask in each segment. **You can study more in-depth about the “why” and the psychology of what we say (and do not say) in the Step #2 INFORMATION portion of your Shottenkirk 7 Sales Manual. Guest Sheet Certification is to be completed prior to your first attempt to complete a Guest Sheet with a live customer. The sooner you learn the sooner you earn!**

Guest Sheet Focus Points:


- Identify your customer/negotiator type and adapt your communication style to them.
- Focus on asking questions that get them to share their current buying motivations.
- Make their vehicle selection about what they need on the vehicle, NOT what they want.
- Utilize active listening so that you do not miss anything important that was said.
- Listen for and capitalize on any answers that reveal rapport building opportunities.
- Maintain positive tone, energy, and body language as you gather the information.
- Customer comfort is crucial. This should feel like a conversation, not an interrogation.
- An Early Manager Introduction (E.M.I.) should happen every time. No exceptions.

Guest Sheet Certification:

Record below which manager and the date that you role-played each of your 7 perfect Guest Sheets.

1. I have performed a perfect Guest Sheet role-play with: _____ on _____
2. I have performed a perfect Guest Sheet role-play with: _____ on _____
3. I have performed a perfect Guest Sheet role-play with: _____ on _____
4. I have performed a perfect Guest Sheet role-play with: _____ on _____
5. I have performed a perfect Guest Sheet role-play with: _____ on _____
6. I have performed a perfect Guest Sheet role-play with: _____ on _____
7. I have performed a perfect Guest Sheet role-play with: _____ on _____

The Guest Sheet is divided into 8 separate performance sections that we will cover in order.



GUEST SHEET

Guest Name: _____
Visit Date: _____
Visit Time: _____

How did you hear about us? _____
Sales Associate: _____

VEHICLE SELECTION

Are you interested in? ☐ New ☐ Used ☐ Best Value

Year _____
Make _____
Model _____

Notes: _____

Mileage Parameters (if considering pre-owned) _____

Equipment Preference #1: _____

Equipment Preference #2: _____

Optional: _____

Exterior: ☐ Lighter ☐ Darker ☐ Other _____

Interior: ☐ Lighter ☐ Darker ☐ Other _____

TRADE VEHICLE INFORMATION

Is this vehicle? ☐ Financed ☐ Leased ☐ Owned

Year _____
Make _____
Model _____

Trim Level _____
Color _____
Mileage _____

What is/was the monthly payment? _____

If financed, what is the exact payoff? _____

If leased, how many payments remain? _____

Which lender (bank) is the vehicle financed or leased with? _____

If owned, do you have the title with you? ☐ Yes ☐ No

DESIRED VEHICLE BUDGET

Monthly Payment _____
Down Payment _____

(Maximizing your down payment results in lower monthly payments, less interest paid, better equity position, more flexible trade-cycle, and a potentially better financial package from lenders.)

GUEST INFORMATION

Legal First Name: _____

Legal Last Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Best Contact Number: () _____

Best Email Address: _____

What is your preferred method of contact? ☐ Text ☐ Call ☐ Email

Will anyone else be involved in this purchase decision? ☐ Yes ☐ No
(if Yes, then who) _____

How would you currently rate your credit from 1 (lowest) to 10 (highest)?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

MANAGER INTRODUCTION

VISIT PLANNING SECTION

1	Vehicle Selection	
2	Trade Evaluation	
3	Vehicle Presentation	
4	Vehicle Demonstration	
5	Credit Verification	
6	Present Purchase Options	
7	Finalize Paperwork	7

*Customizations in step order may result in additional time required to complete transaction

Manager: _____ Time: _____

I have obtained the guest's drivers license and verified that it is the correct person ☐ , it is currently valid (not expired) ☐ , and that the home address is correct ☐.

Guest Sheet: Section 1 Basic Information

Shottenkirk AUTOMOTIVE GROUP		GUEST SHEET																						
Guest Name: _____		Visit Date: _____	Visit Time: _____																					
How did you hear about us? _____		Sales Associate: _____																						
VEHICLE SELECTION Are you interested in? <input type="checkbox"/> New <input type="checkbox"/> Used <input type="checkbox"/> Best Value Year: _____ Make: _____ Model: _____ Notes: _____ Mileage Parameters (if considering pre-owned): _____ Equipment Preference #1: _____ Equipment Preference #2: _____ Optional: _____ Exterior: <input type="checkbox"/> Lighter <input type="checkbox"/> Darker <input type="checkbox"/> Other _____ Interior: <input type="checkbox"/> Lighter <input type="checkbox"/> Darker <input type="checkbox"/> Other _____		TRADE VEHICLE INFORMATION Is this vehicle? <input type="checkbox"/> Financed <input type="checkbox"/> Leased <input type="checkbox"/> Owned Year: _____ Make: _____ Model: _____ Trim Level: _____ Color: _____ Mileage: _____ What is/was the monthly payment? _____ If financed, what is the exact payoff? _____ If leased, how many payments remain? _____ Which lender (bank) is the vehicle financed or leased with? _____ If owned, do you have the title with you? <input type="checkbox"/> Yes <input type="checkbox"/> No																						
DESIRED VEHICLE BUDGET Monthly Payment: _____ Down Payment: _____																								
GUEST INFORMATION Legal First Name: _____ Legal Last Name: _____ Street Address: _____ City: _____ State: _____ Zip: _____ Best Contact Number: () _____ Best Email Address: _____ What is your preferred method of contact? <input type="checkbox"/> Text <input type="checkbox"/> Call <input type="checkbox"/> Email Will anyone else be involved in this purchase decision? <input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes, then who) _____ How would you currently rate your credit from 1 (lowest) to 10 (highest)? <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10		MANAGER INTRODUCTION VISIT PLANNING SECTION <table border="1"> <tr> <td>1</td> <td>Vehicle Selection</td> <td></td> </tr> <tr> <td>2</td> <td>Trade Evaluation</td> <td></td> </tr> <tr> <td>3</td> <td>Vehicle Presentation</td> <td></td> </tr> <tr> <td>4</td> <td>Vehicle Demonstration</td> <td></td> </tr> <tr> <td>5</td> <td>Credit Verification</td> <td></td> </tr> <tr> <td>6</td> <td>Present Purchase Options</td> <td></td> </tr> <tr> <td>7</td> <td>Finalize Paperwork</td> <td>7</td> </tr> </table> Manager: _____ Time: _____ <small>*Customizations in step order may result in additional time required to complete transaction</small>		1	Vehicle Selection		2	Trade Evaluation		3	Vehicle Presentation		4	Vehicle Demonstration		5	Credit Verification		6	Present Purchase Options		7	Finalize Paperwork	7
1	Vehicle Selection																							
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7	Finalize Paperwork	7																						
<small>I have obtained the guest's drivers license and verified that it is the correct person <input type="checkbox"/> , it is currently valid (not expired) <input type="checkbox"/> , and that the home address is correct <input type="checkbox"/> .</small>																								

You have already gotten the customer's first name during the introduction, so now you just need to make sure it's spelled correctly. Names are important, get it right!

"John, do me a favor and go ahead and spell your first and last name for me. I want to make sure that I get it correct?"

Next you will fill in the current date and time.

"John, how did you hear about us? Did you see us on a specific website, did you hear us on the radio, see us on t.v., etc...?"

Lastly, fill in your name on the Sales Associate line.

(The customer will be referred to as John for the rest of this training document.)

Notes:

Guest Sheet: Section 2 Vehicle Selection

Shottenkirk AUTOMOTIVE GROUP **GUEST SHEET**

Guest Name: _____ Visit Date: _____ Visit Time: _____

How did you hear about us? _____ Sales Associate: _____

VEHICLE SELECTION

Are you interested in? ☐ New ☐ Used ☐ Best Value

Year: _____ Make: _____ Model: _____

Notes: _____

Mileage Parameters (if co-owned): _____

Equipment Preference #1: _____

Equipment Preference #2: _____

Optional: _____

Exterior: ☐ Lighter ☐ Darker ☐ Other

Interior: ☐ Lighter ☐ Darker ☐ Other

TRADE VEHICLE INFORMATION

Is this vehicle? ☐ Financed ☐ Leased ☐ Owned

Year: _____ Make: _____ Model: _____

Trim Level: _____ Color: _____ Mileage: _____

What is/was the monthly payment? _____

If financed, what is the exact payoff? _____

If leased, how many payments remain? _____

Which lender (bank) is the vehicle financed or leased with? _____

If owned, do you have the title with you? ☐ Yes ☐ No

DESIRED VEHICLE BUDGET

Monthly Payment: _____ Down Payment: _____

(Maximizing your down payment results in lower monthly payments, less interest paid, better equity position, more flexible trade cycles, and a potentially better financial package from lenders.)

GUEST INFORMATION

Legal First Name: _____

Legal Last Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Best Contact Number: () _____

Best Email Address: _____

What is your preferred method of contact? ☐ Text ☐ Call ☐ Email

Will anyone else be involved in this purchase decision? ☐ Yes ☐ No (If Yes, then who) _____

How would you currently rate your credit from 1 (lowest) to 10 (highest)?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

I have obtained the guest's drivers license and verified that it is the correct person ☐ , it is currently valid (not expired) ☐ , and that the home address is correct ☐ .

MANAGER INTRODUCTION

VISIT PLANNING SECTION

1	Vehicle Selection	<input type="checkbox"/>
2	Trade Evaluation	<input type="checkbox"/>
3	Vehicle Presentation	<input type="checkbox"/>
4	Vehicle Demonstration	<input type="checkbox"/>
5	Credit Verification	<input type="checkbox"/>
6	Present Purchase Options	<input type="checkbox"/>
7	Finalize Paperwork	7 <input type="checkbox"/>

*Customer steps in step order may result in additional time required to complete transaction

Manager: _____ Time: _____

If they have **NOT** brought up a specific model or stock number:

“John, what model were you most interested in seeing today?”

“Great choice, those are fantastic vehicles. Are you considering new, pre-owned, or are you just looking for the best overall value?” (create flexibility)

If they **HAVE** brought up a specific model or stock number:

“I would be happy to show you that vehicle. I’m curious John, was it the styling or the pricing that made you choose that vehicle?”

“If I have other similar vehicles, do you like the idea of being able to choose which one you want?” (any logical customer will answer this with a yes) “Great, I’ll let my manager know.”

“Let me ask you something John, what attracted you to the _____ (model)?”

“Will this be your first _____ (brand name)?” (this can reveal a possible strong brand loyalty)

“Are you going to be the primary driver of the vehicle?” (most will be but if not, find out who will be)

“How will you primarily be using the vehicle?” (listen for a rapport building follow-up question)

“How far is your daily commute?” (this can help organically lead to where they work, listen for rapport)

“Up to how many people might be riding in the vehicle with you?” (potential family information)

“I’ve found that almost all my customers typically have one, or sometimes two options that they would say they have to have on the vehicle. John, what would those one or two things be for you?”

“Why are those options important to you?”

“As far as the exterior of the vehicle, do you prefer lighter or darker shades?”

Guest Sheet: Section 3 Desired Budget

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GUEST SHEET

Guest Name: _____ Visit Date: _____ Visit Time: _____

How did you hear about us? _____ Sales Associate: _____

VEHICLE SELECTION

Are you interested in? ☐ New ☐ Used ☐ Best Value

Year: _____ Make: _____ Model: _____

Notes: _____

Mileage Parameters (if considering pre-owned): _____

Equipment Preference #1: _____

Equipment Preference #2: _____

Optional: _____

Exterior: ☐ Lighter ☐ Darker ☐ Other _____

Interior: ☐ Lighter ☐ Darker ☐ Other _____

TRADE VEHICLE INFORMATION

Is this vehicle? ☐ Financed ☐ Leased ☐ Owned

Year: _____ Make: _____ Model: _____

Trim Level: _____ Color: _____ Mileage: _____

What is/was the monthly payment? **3** _____

If financed, what is the exact payoff? _____

If leased, how many payments remain? _____

Which lender (bank) is the vehicle financed or leased with? _____

If owned, do you have the title with you? ☐ Yes ☐ No

DESIRED VEHICLE BUDGET

Monthly Payment: _____ Down Payment: _____

(Maximizing your down payment results in lower monthly payments, less interest paid, better equity position, more flexible trade-in cycle, and a potentially better financial package from lenders.)

GUEST INFORMATION

Legal First Name: _____

Legal Last Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Best Contact Number: () _____

Best Email Address: _____

What is your preferred method of contact? ☐ Text ☐ Call ☐ Email

Will anyone else be involved in this purchase decision? ☐ Yes ☐ No (If Yes, then who) _____

How would you currently rate your credit from 1 (lowest) to 10 (highest)?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

I have obtained the guest's drivers license and verified that it is the correct person ☐ , it is currently valid (not expired) ☐ , and that the home address is correct ☐ .

MANAGER INTRODUCTION

VISIT PLANNING SECTION

1	Vehicle Selection	<input type="checkbox"/>
2	Trade Evaluation	<input type="checkbox"/>
3	Vehicle Presentation	<input type="checkbox"/>
4	Vehicle Demonstration	<input type="checkbox"/>
5	Credit Verification	<input type="checkbox"/>
6	Present Purchase Options	<input type="checkbox"/>
7	Finalize Paperwork	<input type="checkbox"/>

*Customizations in step order may result in additional time required to complete transaction

Manager: _____ Time: _____

“John, I know that almost all of my customers have put a lot of thought into where they want their monthly payments to be. That being said, where were you hoping to keep yours?” (they say \$600)

“Now when you say \$600, that would be \$600 up to...?” (they say maybe up to \$650)

“If the bank came back and said it would take a little more payment to get you into the perfect vehicle is that something you would consider?”

“Well obviously Mr. customer we can get your payments down to any range you want depending on how you answer my next question.”

“In order to get your payments all the way down to the _____ (range they already said), how much cash were you able to invest into the vehicle?” (they say \$2,000)

“O.K. great, we also believe in making sure everyone knows the top-3 benefits of putting cash down.”

“First of all, your monthly payments will be less. Second, you will pay less interest over the course of the loan which helps recoup a portion of your initial investment. And third, you owe less on the vehicle which helps accelerate your equity position so you can trade out or pay it off sooner.”

“That being said, could you do any more than the _____ if you had to?” Be curious, not pushy.

“If some flexibility was needed to finalize everything, which area is the most important to you? Would you be least flexible on the monthly payment, down payment, or on the vehicle selection?”

“Are all of the decision makers present?” (if not, then find out who and when they can be here)

“How would you rate your credit right now on a scale from 4-9 with 9 being the highest?”

Guest Sheet: Section 4 Current Vehicle Information

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GUEST SHEET

Guest Name: _____ Visit Date: _____ Visit Time: _____

How did you hear about us? _____ Sales Associate: _____

VEHICLE SELECTION			TRADE VEHICLE INFORMATION		
Are you interested in? <input type="checkbox"/> New <input type="checkbox"/> Used <input type="checkbox"/> Best Value			Is this vehicle? <input type="checkbox"/> Financed <input type="checkbox"/> Leased <input type="checkbox"/> Owned		
Year	Make	Model	Year	Make	Model
Notes:			Trim Level	Color	Mileage
Mileage Parameters (if considering pre-owned):			What is/was the monthly payment?		
Equipment Preference #1:			If financed, what is the exact payoff?		
Equipment Preference #2:			If leased, how many payments remain?		
Optional:			Which lender (bank) is the vehicle financed or leased with?		
Exterior: <input type="checkbox"/> Lighter <input type="checkbox"/> Darker <input type="checkbox"/> Other			If owned, do you have the title with you? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Interior: <input type="checkbox"/> Lighter <input type="checkbox"/> Darker <input type="checkbox"/> Other					

DESIRED VEHICLE BUDGET

Monthly Payment: _____ 4 Down Payment: _____

(Obtaining your down payment results in lower monthly payments, less interest paid, better equity position, more flexible trade-in cycle, and a potentially better financial package from lenders.)

GUEST INFORMATION		MANAGER INTRODUCTION	
Legal First Name: _____		VISIT PLANNING SECTION	
Legal Last Name: _____		1	Vehicle Selection
Street Address: _____		2	Trade Evaluation
City: _____	State: _____	3	Vehicle Presentation
Zip: _____		4	Vehicle Demonstration
Best Contact Number: () _____		5	Credit Verification
Best Email Address: _____		6	Present Purchase Options
What is your preferred method of contact? <input type="checkbox"/> Text <input type="checkbox"/> Call <input type="checkbox"/> Email		7	Finalize Paperwork
Will anyone else be involved in this purchase decision? <input type="checkbox"/> Yes <input type="checkbox"/> No			
(If Yes, then who) _____			
How would you currently rate your credit from 1 (lowest) to 10 (highest)?			
<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10			
I have obtained the guest's drivers license and verified that it is the correct person <input type="checkbox"/> , it is currently valid (not expired) <input type="checkbox"/> , and that the home address is correct <input type="checkbox"/> .		Manager: _____	Time: _____

“John, will you be trading in or replacing a vehicle today?”

“Great, what is the year, make, and model?”

“What trim level is that _____?”
(XLE, LX, King Ranch, etc...)

“What made you choose this vehicle when you got it?”

“What color is the vehicle?”

“Exactly how many miles are on the vehicle?”

“Did you put all of those miles on there or did you buy it pre-owned?”

“Based on what you said It looks like you drive around _____ miles per year, is that right? Is that what you are expecting to do with the new vehicle as well?”

“Are you making traditional loan payments to the bank, lease payments to the bank, or do you have the title?” (if they are or were making payments)

“What is the current monthly payment that you’re making?” As an optional response you can pause and look at the payment you wrote down and ask: “How did you get your payment that low?”

If purchased or leased: “What is the exact payoff?” “Which lender do you have it financed with?”

If they answer that they own it, immediately say: “So, you have the clean title with you?” (or access to)

“Where did you purchase/lease this vehicle from?”

“Have you enjoyed driving this vehicle?”

“What did you like the most about this vehicle?”

“Was there anything you disliked?”

“Were there any upgraded options that you wish you had gotten on this vehicle?”

Listen! Listen! Listen! Listen! Listen! Listen! Listen! Listen! Listen! Listen! Listen! Listen! Listen!

Guest Sheet: Section 5 Guest Information

Shottenkirk AUTOMOTIVE GROUP		GUEST SHEET	
Guest Name: _____		Visit Date: _____	Visit Time: _____
How did you hear about us? _____		Sales Associate: _____	
VEHICLE SELECTION		TRADE VEHICLE INFORMATION	
Are you interested in? <input type="checkbox"/> New <input type="checkbox"/> Used <input type="checkbox"/> Best Value		Is this vehicle? <input type="checkbox"/> Financed <input type="checkbox"/> Leased <input type="checkbox"/> Owned	
Year _____	Make _____	Year _____	Make _____
Model _____		Year _____	Model _____
Notes: _____		Trim Level _____	Color _____
Mileage Parameters (if considering pre-owned) _____		Mileage _____	
Equipment Preference #1: _____		What is/was the monthly payment? _____	
Equipment Preference #2: _____		If financed, what is the exact payoff? _____	
Optional: _____		If leased, how many payments remain? _____	
Exterior: <input type="checkbox"/> Lighter <input type="checkbox"/> Darker <input type="checkbox"/> Other _____		Which lender (bank) is the vehicle financed or leased with? _____	
Interior: <input type="checkbox"/> Lighter <input type="checkbox"/> Darker <input type="checkbox"/> Other _____		If owned, do you have the title with you? <input type="checkbox"/> Yes <input type="checkbox"/> No	
DESIRED VEHICLE BUDGET			
Monthly Payment _____		Down Payment _____	
(Maximizing your down payment results in lower monthly payments, less interest paid, better equity position, more flexible trade cycle, and a potentially better financial package from lenders.)			
GUEST INFORMATION		MANAGER INTRODUCTION	
Legal First Name: _____		VISIT PLANNING SECTION	
Legal Last Name: _____		1 Vehicle Selection <input type="checkbox"/>	
Street Address: _____		2 Trade Evaluation <input type="checkbox"/>	
City: _____	Zip: _____	3 Vehicle Presentation <input type="checkbox"/>	
Best Contact Number: _____		4 Vehicle Demonstration <input type="checkbox"/>	
Best Email Address: _____		5 Credit Verification <input type="checkbox"/>	
What is your preferred method of contact? <input type="checkbox"/> Text <input type="checkbox"/> Call <input type="checkbox"/> Email		6 Present Purchase Options <input type="checkbox"/>	
Will anyone else be involved in this purchase decision? <input type="checkbox"/> Yes <input type="checkbox"/> No		7 Finalize Paperwork <input type="checkbox"/>	
(If Yes, then who) _____		*Customizations in step order may result in additional time required to complete transaction	
How would you currently rate your credit from 1 (lowest) to 10 (highest)?		Manager: _____ Time: _____	
<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10			
I have obtained the guest's drivers license and verified that it is correct person <input type="checkbox"/> , it is currently valid (not expired) <input type="checkbox"/> , and that the home address is correct <input type="checkbox"/> .			

“The last thing I need before going to get keys is to make a copy of your driver’s license.” You are not to go on any demonstration drive with a customer without having a copy of their current and valid driver’s license. **Use the three checkboxes on the bottom to verify that you have properly inspected the customer’s driver’s license.**

“If I needed to get in touch with you during business hours, what would be the best number to call?”

“Also, if I needed to send you something or if the manufacturer needed to get you any product updates, what would be the best email address?”

“Perfect, thank you John.” “By the way, do you prefer to be called, texted, or emailed?”

“O.K. John, I just want to make sure that we are on the same page. You’re looking for _____ (do a quick recap of the information gathered), is all of that correct?”

“Great, John now I’m going to put this information into the system then I will quickly update _____ (the sales manager that did the Early manager introduction) and grab some keys.”

Notes:

Guest Sheet: Section 6 Early Manager Introduction

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GUEST SHEET

Guest Name: _____ Visit Date: _____ Visit Time: _____

How did you hear about us? _____ Sales Associate: _____

VEHICLE SELECTION

Are you interested in? ☐ New ☐ Used ☐ Best Value

Year: _____ Make: _____ Model: _____

Notes: _____

Mileage Parameters (if considering pre-owned): _____

Equipment Preference #1: _____

Equipment Preference #2: _____

Optional:

Exterior: ☐ Lighter ☐ Darker ☐ Other _____

Interior: ☐ Lighter ☐ Darker ☐ Other _____

TRADE VEHICLE INFORMATION

Is this vehicle? ☐ Financed ☐ Leased ☐ Owned

Year: _____ Make: _____ Model: _____

Trim Level: _____ Color: _____ Mileage: _____

What is/was the monthly payment? _____

If financed, what is the exact payoff? _____

If leased, how many payments remain? _____

Which lender (bank) is the vehicle financed or leased with? _____

If owned, do you have the title with you? ☐ Yes ☐ No

DESIRED VEHICLE BUDGET

Monthly Payment: _____ Down Payment: _____

(Maximizing your down payment results in lower monthly payments, less interest paid, better equity position, more flexible trade cycle, and a potentially better financial package from lenders.)

GUEST INFORMATION

Legal First Name: _____

Legal Last Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Best Contact Number: () _____

Best Email Address: _____

What is your preferred method of contact? ☐ Text ☐ Call ☐ Email

Will anyone else be involved in this purchase decision? ☐ Yes ☐ No
(If Yes, then who) _____

How would you currently rate your credit from 1 (lowest) to 10 (highest)?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

MANAGER INTRODUCTION

VISIT PLANNING SECTION

1	Vehicle Selection	<input type="checkbox"/>
2	Trade Evaluation	<input type="checkbox"/>
3	Vehicle Presentation	<input type="checkbox"/>
4	Vehicle Introduction	<input type="checkbox"/>
5	Credit Verification	<input type="checkbox"/>
6	Present Purchase Options	<input type="checkbox"/>
7	Finalize Paperwork	<input type="checkbox"/>

*Customers in deep order may result in additional time required to complete transaction

Manager: _____ Time: _____

I have obtained the guest's drivers license and verified that it is the correct person's, it is currently valid (not expired), and that the home address is correct.

This is a vital step in the process that needs to happen every time. The Early Manager Introduction (E.M.I.) will give the manager a chance to insert themselves early on in the process to position themselves to be able to help you throughout the entire car deal.

What do YOU do during the Early Manager Introduction?

When the manager enters the office to introduce themselves you should stay seated and just find a place to pause your conversation, and the manager will begin their introduction. **As the manager engages with the customer(s) write down the name of the manager in the lower right corner box of your Guest Sheet.**

“The last thing I need before going to get keys is to make a copy of your driver’s license.” You are not to go on any demonstration drive with a customer without having a copy of their current and valid driver’s license. **Use the three checkboxes on the bottom to verify that**

you have properly inspected the customer’s driver’s license.

“If I needed to get in touch with you during business hours, what would be the best number to call?”

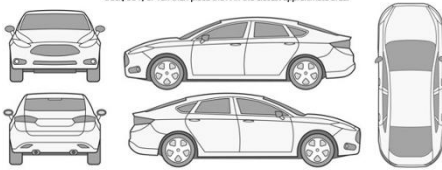
“Also, if I needed to send you something or if the manufacturer needed to get you any product updates, what would be the best email address?”

“Perfect, thank you John.” “By the way, do you prefer to be called, texted, or emailed?”

“O.K. John, I just want to make sure that we are on the same page. You’re looking for _____ (do a quick recap of the information gathered), is all of that correct?”

“Great, John now I’m going to put this information into the system then I will quickly update _____ (the sales manager that did the Early manager introduction) and grab some keys.”

Guest Sheet: Trade Condition Information

TRADE HISTORY	
YES NO	YES NO
<input type="checkbox"/> Are you the vehicle's original owner?	<input type="checkbox"/> Has the vehicle ever been repainted?
<input type="checkbox"/> Do you have the original keys? How many _____?	<input type="checkbox"/> Has the vehicle ever been smoked in?
<input type="checkbox"/> Did you regularly service the vehicle?	<input type="checkbox"/> Have the tires been replaced in the last 6 months?
<input type="checkbox"/> Do you have all of the service records?	<input type="checkbox"/> Was an extended service contract purchased?
Has the vehicle ever had (check all that apply): <input type="checkbox"/> Hail damage <input type="checkbox"/> Flood damage <input type="checkbox"/> Body damage <input type="checkbox"/> Major mechanical repairs	
Please describe the issue(s) from above: _____	
TRADE CONDITION	
Please rate the below 10 key condition areas on your trade on a scale from 1-8 with 8 being the best current condition.	
Tires - How many Miles are on the current set of tires? _____ Brakes - When was the last time the brakes were serviced? _____ Paint & Body - Are there any scratches or dents larger than 2 inches? _____ Glass - Are there any stars, chips, or cracks anywhere on the glass? _____ Maintenance - Has all required maintenance been performed? _____ Interior - Are there any stains or damage to the interior? _____ Wheels - Are there any scrapes or scuffs on any of the wheels? _____ Electronics - Are all electronics working as designed? _____ Suspension - Does anything feel off with the suspension? _____ Engine - Are you aware of any known current mechanical issues? _____	
TRADE CONDITION SCORE (this is the sum total of the 10 key condition areas above)	
If you did not trade this vehicle in, what is the next service, maintenance item, or repair that would be needed? _____	
Please note with an X the location of any scratches, dents, glass damage, or body damage on the vehicle. If the vehicle is a truck, SUV, or van then place the X in the closest approximate area.	
	

"John, what are you anticipating as your vehicle's current market trade value today?"

"Ok, what source did you use to come up with this figure? Did you bring any printouts or documentation with you?"

"Does your vehicle have any upgraded options or packages that you feel we should know about?"

"Did you take advantage of protecting your investment on this vehicle with an extended service contract?" (if yes)

"Do you know how much protection still remains?"

Now that we have some basic information about the customer's trade, we will focus the remaining two sections on the current physical condition of the trade vehicle.

"John, there are 10 key-condition areas that have the most impact on the vehicle's current market trade value."

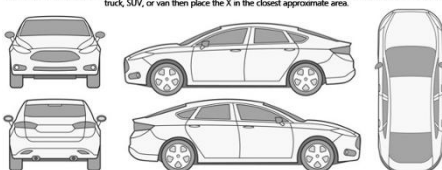
"I'm going to ask you about each one and please rate them from 1-8 with 8 being the best condition."

Use the questions next to each area as your guide. Once they have answered each of the 10 areas, then add up the total and write that number in the box next to "Vehicle Condition Score."

If they ask why you need all of this information just say:

"John, I know that you're excited to go see the new vehicle, however, gathering this information now actually helps to speed things up."

"We also need this because the more accurate information that I can get to my managers will help them get you a more accurate and hopefully a higher market value for your vehicle."

TRADE HISTORY	
YES NO	YES NO
<input type="checkbox"/> Are you the vehicle's original owner?	<input type="checkbox"/> Has the vehicle ever been repainted?
<input type="checkbox"/> Do you have the original keys? How many _____?	<input type="checkbox"/> Has the vehicle ever been smoked in?
<input type="checkbox"/> Did you regularly service the vehicle?	<input type="checkbox"/> Have the tires been replaced in the last 6 months?
<input type="checkbox"/> Do you have all of the service records?	<input type="checkbox"/> Was an extended service contract purchased?
Has the vehicle ever had (check all that apply): <input type="checkbox"/> Hail damage <input type="checkbox"/> Flood damage <input type="checkbox"/> Body damage <input type="checkbox"/> Major mechanical repairs	
Please describe the issue(s) from above: _____	
TRADE CONDITION	
Please rate the below 10 key condition areas on your trade on a scale from 1-8 with 8 being the best current condition.	
Tires - How many Miles are on the current set of tires? _____ Brakes - When was the last time the brakes were serviced? _____ Paint & Body - Are there any scratches or dents larger than 2 inches? _____ Glass - Are there any stars, chips, or cracks anywhere on the glass? _____ Maintenance - Has all required maintenance been performed? _____ Interior - Are there any stains or damage to the interior? _____ Wheels - Are there any scrapes or scuffs on any of the wheels? _____ Electronics - Are all electronics working as designed? _____ Suspension - Does anything feel off with the suspension? _____ Engine - Are you aware of any known current mechanical issues? _____	
TRADE CONDITION SCORE (this is the sum total of the 10 key condition areas above)	
If you did not trade this vehicle in, what is the next service, maintenance item, or repair that would be needed? _____	
Please note with an X the location of any scratches, dents, glass damage, or body damage on the vehicle. If the vehicle is a truck, SUV, or van then place the X in the closest approximate area.	
	

Guest Sheet: Trade Vehicle Walkaround

TRADE HISTORY	
YES NO	YES NO
<input type="checkbox"/> Are you the vehicle's original owner?	<input type="checkbox"/> Has the vehicle ever been repainted?
<input type="checkbox"/> Do you have the original keys? How many ____?	<input type="checkbox"/> Has the vehicle ever been smoked in?
<input type="checkbox"/> Did you regularly service the vehicle?	<input type="checkbox"/> Have the tires been replaced in the last 6 months?
<input type="checkbox"/> Do you have any of the service records?	<input type="checkbox"/> Was an extended service contract purchased?
Has the vehicle ever had (check all that apply): <input type="checkbox"/> Hail damage <input type="checkbox"/> Flood damage <input type="checkbox"/> Body damage <input type="checkbox"/> Major mechanical repairs	
Please describe the issue(s) from above: _____	
TRADE CONDITION	
Please rate the below 10 key condition areas on your trade on a scale from 1-8 with 8 being the best current condition.	
____ Tires - How many Miles are on the current set of tires?	_____
____ Brakes - When was the last time the brakes were serviced?	_____
____ Paint & Body - Are there any scratches or dents larger than 2 inches?	_____
____ Glass - Are there any stars, chips, or cracks anywhere on the glass?	_____
____ Maintenance - Has all required maintenance been performed?	_____
____ Interior - Are there any stains or damage to the interior?	_____
____ Wheels - Are there any scrapes or scuffs on any of the wheels?	_____
____ Electronics - Are all electronics working as designed?	_____
____ Suspension - Does anything feel off with the suspension?	_____
____ Engine - Are you aware of any known current mechanical issues?	_____
TRADE CONDITION SCORE (this is the sum total of the 10 key condition areas above)	
If you did not trade this vehicle in, what is the next service, maintenance item, or repair that would be needed?	
<p>Please note with an X the location of any scratches, dents, glass damage, or body damage on the vehicle. If the vehicle is a truck, SUV, or van then place the X in the closest approximate area.</p>	

Now you will finish the Guest Sheet along with the customer outside at the trade vehicle. Start with this question as you are approaching the trade with the customer.

“John, let me ask you something. If for some reason you were to end up keeping the car and not trade it in today, what’s the next thing you would need to do to it?”

It is ok to continue talking to your customer during this part of the process. Silence is awkward, keep building rapport.

As you walk around the vehicle you should touch and record any damage on the vehicle with an “X” on the vehicle layout images.

Also, make sure that everything lines up with what they told you the rating is on the 10 key condition areas you asked them about.

For example, if they rated the Glass condition area an 8 (the best) when you asked but when you look at it you can see a crack or stars or chips, you should point out the discrepancy and then say:

“John, I know inside you rated the glass as an 8, which would be the best. As you can see right here, there is a crack in the windshield which will definitely lower the condition score. I just wanted you to be aware so that you weren’t surprised later on.”

Other proper rapport building phrasing:

If you see interior stains: **“Have you tried to get that professionally cleaned or repaired?”**

If you see light scratches: **“This scratch doesn’t look that deep. Don’t worry, we’ve got some paint pros that can work on that for us** (while gently attempting to rub the scratch off in front of them).”

If you see minor dents or dings: **“That’s not too bad, tell me about what happened here.”**

If you see **MAJOR** dents or dings: **“John, they’re going to ask, tell me about what happened here.”**

Also, you know as well as I do, if there’s no dent then it’s worth more money. Make sure when you get back to the business office that you let them explain the different protection packages. I know they have protection options that if this car had, it could have potentially been used to take care of something like this which would have made this car worth more today.” (this plants seeds for F&I)

If they ask and try to get you to discuss what it is worth, you can say:

“John, I have no idea what the market is going to say that your vehicle is worth. I’m simply getting the initial condition information from the vehicle. Our appraisal manager will input the current condition and combine it with the current market data to determine its actual current market value.”

“Don’t worry, they will do all of that while we are gone test driving the vehicle you selected. Doing it this way knocks out two birds with one stone and saves you a lot of time.”

Notes: