SALES ASSISTANT · PHONE CALL EXCELLENCE

Inbound Call — How to Win the Call

Every checkpoint below is a box our graders review while listening to your call. This page shows you exactly how to win the call — and how to **ACE** it.

TO PASS THE CALL
- Greeting
- 3 of 5 Phone Pop 5
- Summary

OUR GOAL Phone Call Excellence — for the whole team.

HOW TO ACE THE CALL



To pass: the Greeting + 3 of the Phone Pop 5 + the Summary. An ACE is a perfect call — every one of these:

- ★ **All of the Phone Pop 5** hit
- ★ **New greeting** — incl. how's your day and what city
- ★ **The Summary** — next steps and the text opt-in
- ★ **Tagged the manager in DriveCentric** when an assist was required
- ★ **Great tone** from hello to goodbye
- ★ **Their name** used throughout the call
- ★ **Thanked them** for calling Toyota of San Bernardino

NO APPOINTMENT = MANAGER ASSIST. Tagged in DriveCentric on every call where an appointment was not set — regardless of the reason.

THE OPEN — **The Greeting** — Always first · **Required**

▶

THE HEART OF THE CALL — **The Phone Pop 5** — Any order · **3 of 5 required**

▶

THE CLOSE — **The Summary** — Always last · **Required**

Miss the Greeting or the Summary and the call is an **automatic fail** — no matter how many of the Phone Pop 5 you hit.

OPEN

The Greeting

REQUIRED · AUTO-FAIL IF MISSED

Always first. Open every call the same way, word for word. This one is scored on whether you said it.

> **You:** *"Thank you for calling Toyota of San Bernardino. My name is* **[YOUR NAME]**. *I am a sales assistant. Who do I have the pleasure of speaking with?"*
>
> Customer gives their name.
>
> **You:** *"Hi,* **[CUSTOMER NAME]**. *How is your day going?"*
>
> **You:** *"Great!* ***What city are you calling from?****"*

NOT OPTIONAL Ask what city they're calling from on **every call, within the first 90 seconds.** If the customer interrupts with their question, ask the city first — then answer. This is part of the job.

Completed when: you gave your name, said you're a sales assistant, asked for theirs, asked how their day is going, and asked what city — within the first 90 seconds.

THE PHONE POP 5

Any order · **3 of 5** required to pass · all 5 to ACE

1 The Name Game

The most important one. Their name inside the first 20 seconds, their **full name and phone number** inside the first minute, and their name used **at least twice** during the call.

Completed when: you got the name and number, and used their name twice. · Saying it in the goodbye does **not** count. Ask if they've been to the dealership before.

2 Sell the Store

Every call, brag about the store — and match the brag to what the customer is calling about. Use a **complimentary word: great, amazing, or fantastic**. A flat fact doesn't count.

IF THEY'RE CALLING ABOUT…	SAY SOMETHING LIKE…
Financing	*"We have* ***great*** *financing."*
A vehicle / inventory — in stock or not	*"We own* ***two*** *Toyota stores, so we have a* ***fantastic*** *selection."*
Location or directions	*"We're* ***right off the freeway*** *—* ***amazing****ly close to anywhere in the Inland Empire."*
Spanish-speaking customer / language	*"We have a* ***great*** *bilingual staff."*

Completed when: you praised the store with great, amazing, or fantastic — tied to what the customer called about.

3 Trade Talk

Ask it this way. A customer planning to sell to CarMax will say "no trade" — but they'll still tell you what they drive.

> **Best:** *"What are you driving now?"* **Second choice:** *"Do you have a trade-in?"*

Completed when: you raised it — or the customer brought up their trade on their own. If they truly have no trade that's fine — never asking is the miss.

4 Finance Ask

Suggest — don't ask. Suggest that they'll be putting some money down and financing. It assumes the sale and invites them to correct you.

> *"Most folks are putting **a little money down and financing** — is that what you had in mind?"*

DO NOT ask "How are you paying?" · **Do not** mention cash · **Do not** mention interest rates.

Completed when: you suggested money down and financing.

5 Appointment Ask

Ask for a **specific day and a specific time** — same day preferred, within 72 hours at the most. **Invite them to the dealership on every call, no matter what.**

> *"I've got **today at 4**, or would **tomorrow at 10** be better for you?"*

Can't set an appointment, or need to get back to the customer? Get a **manager assist** and **tag the manager in DriveCentric**.

Completed when: you **asked**. You don't have to land it to pass — but landing it earns you extra credit below.

THE CLOSE: THE SUMMARY

REQUIRED · AUTO-FAIL IF MISSED

Always last. Every call ends the same way. Before you hang up:

1. **Recap the call** — the vehicle, their trade, the money-down-and-finance plan, and the appointment day and time.
2. **Tell them what you'll do next** for them.
3. **Text opt-in** — tell them to go ahead and opt in to your text.
4. **What happens next** — including a manager reaching out to them, when appropriate.

> *"**[CUSTOMER NAME]**, I'm sending you a text right now with my contact information and everything we discussed — go ahead and opt in so we can stay in touch. Next, **[WHAT HAPPENS NEXT]**. Thank you for calling Toyota of San Bernardino."*

Every call ends: "Thank you for calling Toyota of San Bernardino."

⚠ AUTOMATIC FAIL — NO MATTER YOUR SCORE

1. **No Greeting** — the call didn't open with the script.
2. **No Summary** — the call didn't close with the recap and thank-you.
3. **Quoting a monthly payment, interest rate, or term** over the phone. Invite them in and let the desk do the numbers.

And remember: no appointment = manager assist, tagged in DriveCentric — every time.

EXTRA CREDIT

These only ever help you. They can never lower your score.

- ★ **Appointment set** — you landed it
- ★ **Great tone** — warm, never rushed
- ★ **Strong communication** — clear and easy
- ★ **Controlled the call** — you led it
- ★ **Strong summary** — clear next steps
- ★ **Great overall call**

SALES ASSISTANT · PHONE CALL EXCELLENCE

Top 10 Winning Word Tracks

Say them word for word. Use them on every call to take control, build the relationship, and win the appointment.

1 ***"What are you driving now?"***

Why it wins: Opens the trade conversation. Even a customer headed to CarMax will tell you what they drive.

2 ***"Have you been to our dealership before?"***

Why it wins: Tells you if they know us — and sets up your "Sell the Store" brag.

3 ***"Let me ask you a question..."***

Why it wins: Then ask one. It focuses the customer on your question — and gives you a moment to form the best possible question.

4 ***"Have you bought a car from us before?"***

Why it wins: Spots a returning customer — welcome them back and pull up their history.

5 ***"What's most important to you in your next vehicle?"***

Why it wins: Gets their real needs on the table, so the appointment is about their car — not just any car.

6 ***"Who else will be part of the decision?"***

Why it wins: Finds every decision-maker so they all come to the appointment — no "I need to talk to my spouse first."

7 ***"When are you hoping to be driving your new vehicle?"***

Why it wins: Learns their timeline and builds urgency for a same-day or next-day appointment.

8 ***"If that exact one isn't available, would you be open to something similar?"***

Why it wins: Keeps the call alive when the car is gone — and we own two stores, so the selection is fantastic.

9 ***"What's the best number to text you at?"***

Why it wins: Locks in their cell for the Name Game and the text opt-in — the lifeline if the call drops.

10 ***"I have today at 4 or tomorrow at 10 — which works better? And bring your current vehicle so we can appraise it."***

Why it wins: Two choices, no "no" — and it ties the trade to the appointment.

SELL THE SIZZLE – GET PEOPLE IN THE DOOR

You're not just a phone agent. **You are a salesperson.**

- **Be complimentary.** Get people excited. Use urgency.
- **That's why you ask what city they're calling from.** In the Inland Empire? There's no reason they shouldn't come in. Sell them on it.
- **Invite them in — every call,** even if we don't have the car.
- **We come up with cars for people all the time.** We dealer trade, we find it, and we make people happy.

OUR JOB: GET MORE PEOPLE IN THE DOOR.