



A Culture of  
Customer First



The Ultimate  
Driving Machine®



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Customer First



The Ultimate  
Driving Machine®

## CUSTOMER TREATMENT PASSPORT. CUSTOMER FIRST: MODERN LUXURY MOMENTS.

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

# CUSTOMER FIRST.

## DEALERSHIP VISION STATEMENT.

At \_\_\_\_\_ name of dealership \_\_\_\_\_ ,

we will be known for \_\_\_\_\_ value #1 \_\_\_\_\_ ,

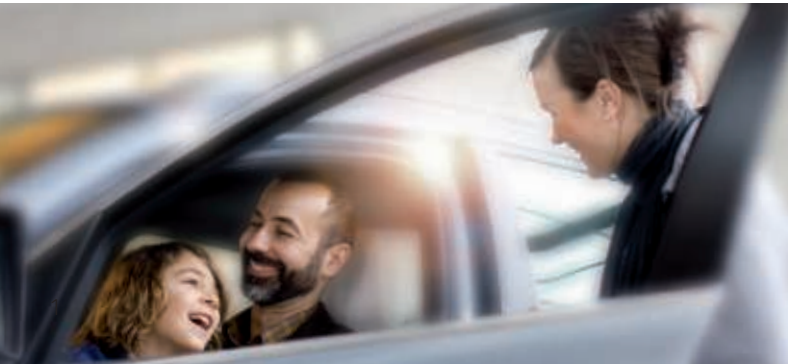
\_\_\_\_\_ value #2 \_\_\_\_\_ and \_\_\_\_\_ value #3 \_\_\_\_\_

with our current and future customers as we develop  
a Culture of Customer First.

# CUSTOMER FIRST.

## MODERN LUXURY MOMENTS.

We have outlined eight “Modern Luxury Moments” that accomplish a very important goal—to arouse enthusiasm and emotions at every customer contact. Our Modern Luxury Moments define what we deliver, how we behave, and the feeling we seek to create for our customers. Each one of these moments is crucial to making the visit to our dealership an unforgettable experience.



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## 1. PROVIDE A WARM WELCOME.

“Whether in person or on the phone, I always feel welcomed and appreciated. I was greeted the moment I entered the dealership; the environment was warm and inviting. The staff made a great impression—like doing business with BMW is where I need to be.”

**Open** \_\_\_\_\_

**Warm** \_\_\_\_\_

**Authentic** \_\_\_\_\_

## How would I score today?

|              |                      |          |          |             |
|--------------|----------------------|----------|----------|-------------|
| <b>1</b>     | <b>2</b>             | <b>3</b> | <b>4</b> | <b>5</b>    |
| insufficient | room for improvement | average  | refined  | exceptional |

## Key Habits

- Practice the 10-5 Rule, including making eye contact, smiling, verbalizing a warm welcome and thanking customers for coming to the dealership. Ensure customers are greeted the moment they enter the dealership (i.e. within two minutes or applicable time frame).
- Get up from behind desks to welcome customers to the dealership, showroom or advisor offices.
- Use an open hand when directing customers; take at least three steps and/or accompany them when possible; open doors and extend appropriate courtesies.
- Answer phones within three rings; ask customers to be placed on hold; inform customers before transferring calls.
- Demonstrate a polished presence, refined body language and a positive attitude; use a warm, authentic tone of voice; smile.

## How Can I Improve?

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## 2. EXPLAIN PRODUCTS WITH PASSION.

“Every time I visit the dealership, it’s always an engaging experience. I appreciate that they get to know me and understand what is important to me. I have a good feel for the products and features that best connect to my unique lifestyle and needs. I am impressed with the insight and knowledge of my advisors and their willingness to educate me. Their passion is contagious! I understand what sets BMW apart from other brands.”

**Engage** \_\_\_\_\_

\_\_\_\_\_

**Recommend** \_\_\_\_\_

\_\_\_\_\_

**Differentiate** \_\_\_\_\_

\_\_\_\_\_

### How would I score today?

|              |                      |          |          |             |
|--------------|----------------------|----------|----------|-------------|
| <b>1</b>     | <b>2</b>             | <b>3</b> | <b>4</b> | <b>5</b>    |
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### Key Habits

- Personalize the interaction; engage customers in meaningful conversation (i.e. observe, ask, listen); ascertain *what* and *who* is most important to the customer.
- Customize the offer and all recommendations; base suggestions on individual customer lifestyle/needs. Utilize the Virtual Product Presenter whenever possible to bring your recommendations to life.
- Differentiate products and services by communicating benefits of upgrades/options as well as differentiators against competitor products; highlight exclusive benefits of BMW Certified Technicians, parts and other accessories including tires and chemicals.

### How Can I Improve?

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### 3. DELIVER THE ULTIMATE PRODUCT EXPERIENCE.

“I am excited by BMW’s products and my dealership experience! I was given just the right amount of attention and was able to test drive the car that interested me the most. I get it now! After experiencing the product, and receiving great insight into the various lifestyle accessories offered, I feel empowered to make the right decision.”

**Champion** \_\_\_\_\_

\_\_\_\_\_

**Stimulate** \_\_\_\_\_

\_\_\_\_\_

**Educate** \_\_\_\_\_

\_\_\_\_\_

#### How would I score today?

**1**

insufficient

**2**

room for improvement

**3**

average

**4**

refined

**5**

exceptional

#### Key Habits

- Be a champion for the test drive and make it available to all interested parties.
- Leverage all features of the car during the test drive; enliven the senses by customizing the experience (i.e. music stations, routes); make it meaningful and stimulating.
- Educate customers by sharing the value of options/upgrades/accessories and BMW aftersales services including the benefits of BMW Certified Technicians/Vehicle Specialists.
- Ensure complete and appropriate customer hand-off; document valuable customer information to support future interactions and to develop relations.

#### How Can I Improve?

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## 4. CLOSE WITH CONFIDENCE.

“I feel confident about doing business with BMW—my advisor was a great confidant and helped me arrive at the best product/service decision, reinforcing my faith in their business with every transaction. I am happy with my choices and would definitely recommend this dealership to my family and friends. I will highly rate my experience!”

**Reinforce** \_\_\_\_\_

\_\_\_\_\_

**Be Consultative** \_\_\_\_\_

\_\_\_\_\_

**Show Consideration** \_\_\_\_\_

\_\_\_\_\_

## How would I score today?

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room for  
improvement

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average

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refined

**5**

exceptional

## Key Habits

- Make customers feel confident by reinforcing their decisions and customized choices; be genuine and specific.
- Clearly explain contractual elements; answer all questions; support a clear decision with honesty and transparency.
- Be respectful of the customer’s time—for sales negotiations, aim to complete the process within 15-45 minutes, for service and other purchases, be considerate of the customer’s scheduling constraints.
- Consider the right environment for your customer; provide a calm, comfortable atmosphere devoid of interruptions and loud noises; use ambiance and environment to create a feeling of being well cared for (i.e. the five senses, cleanliness, organization, coffee music, etc.).

## How Can I Improve?

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## 5. HANDOVER IN STYLE.

“I never expected to pick up my car and have it be so meaningful. I’ve been coming to the dealership for years and they still deliver that extra touch that keeps me coming back. They take time to explain all the features of my car and how I can benefit from using them—I learn something new every time. It’s always a worthwhile visit.”

**Reveal** \_\_\_\_\_

\_\_\_\_\_

**Delight** \_\_\_\_\_

\_\_\_\_\_

**Educate** \_\_\_\_\_

\_\_\_\_\_

### How would I score today?

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### Key Habits

- Plan and prepare for the handover; ensure cars are ready for delivery in showroom condition; confirm the timeframe available for the process in advance; contact customers in the method they prefer.
- Leverage the elements of surprise and delight; celebrate the occasion; deliver a personalized gift/memorable reveal; utilize BMW empowerment tools.
- Use the handover as an opportunity to educate the customer about the car; always teach something new; make the time and experience worthwhile; clearly explain all service requirements and charges.
- Contact customers within 48 hours after new vehicle delivery and schedule second appointment before customers leave the dealership as part of the BMW Encore Program; escort customers and introduce them to other dealership team members.

### How Can I Improve?

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## 6. MANAGE CUSTOMER CHALLENGES.

“I feel that everyone at the dealership cares about my needs and my experience. They do a great job of checking in with me, and whenever I provide feedback, they listen and are quick to respond. Not only do I feel like they value my insight and understand my needs, but I feel like I’ve got someone in my corner who is there to help whenever a challenge might arise.”

**Care** \_\_\_\_\_

\_\_\_\_\_

**Empathize** \_\_\_\_\_

\_\_\_\_\_

**Respond** \_\_\_\_\_

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### How would I score today?

| 1            | 2                    | 3       | 4       | 5           |
|--------------|----------------------|---------|---------|-------------|
| insufficient | room for improvement | average | refined | exceptional |

### Key Habits

- Show that you care; proactively inquire regarding the level of customer experience; own any challenges or issues brought to your attention.
- Put yourself in the customer’s shoes; normalize customer reactions by first empathizing before apologizing; thank the customer for taking the time to bring the challenge to your attention.
- Initiate resolution and/or give options; manage the challenge; engage the appropriate people to ensure the right solution; confirm customer satisfaction; complete necessary follow-up.
- Share relevant information with team members to eliminate similar issues in the future; document customer interactions using CRM tools.

### How Can I Improve?

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## 7. STRENGTHEN THE RELATIONSHIP.

“There is no other brand that enhances the journey of vehicle ownership like BMW does. I feel appreciated as a customer—they stay in touch with me and find ways to impress me even when it is not expected. I feel connected and engaged—like a valued member of the BMW community and I want my family, friends and colleagues to enjoy this experience too!”

**Appreciate** \_\_\_\_\_

\_\_\_\_\_

**Connect** \_\_\_\_\_

\_\_\_\_\_

**Contribute** \_\_\_\_\_

\_\_\_\_\_

## How would I score today?

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room for  
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exceptional

## Key Habits

- Proactively show that you appreciate your customers' business by connecting in with them a minimum of two times per year outside of a sales or service need; make contact relevant and meaningful.
- Utilize hand-written notes to demonstrate effort and thoughtfulness; use personal details documented at earlier phases; leverage BMW empowerment tools (i.e. postcards, thank you notes, holiday greetings).
- Be community-focused, understand how events, experiences and lifestyle moments can contribute to a customer's unique interests and wants; make a contribution and a connection.
- Monitor, manage and maintain your dealership's social and online reputation; be part of the conversation; ensure the perception of the dealership's brand is aligned with a premium brand experience and with modern luxury standards.

## How Can I Improve?

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## 8. OFFER A FOND FAREWELL.

“Right up to the last second, I feel appreciated and at home while at the dealership. My team there provides assistance beyond what I ever expect which shows me how hard they all work to continue to earn my business. My experience at the dealership always leaves a lasting impression. I look forward to my next visit and they seem to as well.”

**Be Courteous** \_\_\_\_\_

\_\_\_\_\_

**Recognize** \_\_\_\_\_

\_\_\_\_\_

**Extend** \_\_\_\_\_

\_\_\_\_\_

## How would I score today?

|              |                         |          |          |             |
|--------------|-------------------------|----------|----------|-------------|
| <b>1</b>     | <b>2</b>                | <b>3</b> | <b>4</b> | <b>5</b>    |
| insufficient | room for<br>improvement | average  | refined  | exceptional |

## Key Habits

- Proactively check for satisfaction and the need for additional assistance before customer interactions/experiences draw to a close.
- Thank customers for their time and loyalty, invite them to return and/or to contact you for any needs; always wish them well.
- Use an open hand when directing customers; take at least three steps and/or accompany them when possible; open doors and extend appropriate courtesies.

## How Can I Improve?

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# THE LEADER IN YOU.

“Integrity is doing the right things—even when no one is watching.”  
- C.S. Lewis, Author

**Identify a manager or team member who exhibits integrity and strong leadership qualities. What specific behaviors could you begin to follow and emulate?**

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## WHAT YOU CAN DO.

Stand out. Courageously follow successful colleagues, and then show others how to follow. Be easy to follow. Be accountable to others. Lead by example. Catch colleagues doing things right and then congratulate them for a job well done. Ask questions, and seek out the answers. Expand your integrity, inspire others and innovate!

# OUR COMMITMENT.

We are committed to exemplifying the passion and performance of our products by creating the distinctive experiences outlined in the Modern Luxury Moments, and by energizing our Customer First Habits and our Customer First Pledge.

As a member of \_\_\_\_\_ name of dealership \_\_\_\_\_, I am committed to focusing on every interaction—not just with our customers but with my colleagues too. Together, we will achieve a new standard of customer orientation that is unparalleled among our competitors.

I will personally strive to evolve my own behavior and find new ways to deliver superior value. I support the collective vision of BMW Group and \_\_\_\_\_ name of dealership \_\_\_\_\_ as we work hard to ensure our customers remain at the heart of everything we do.

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(associate signature)

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(date)

