

# Customer First.

## Sales Playbook.



Customer First  
Plan

Sales Playbook



The Ultimate  
Driving Machine®

## Delivering The Premium Customer Experience.



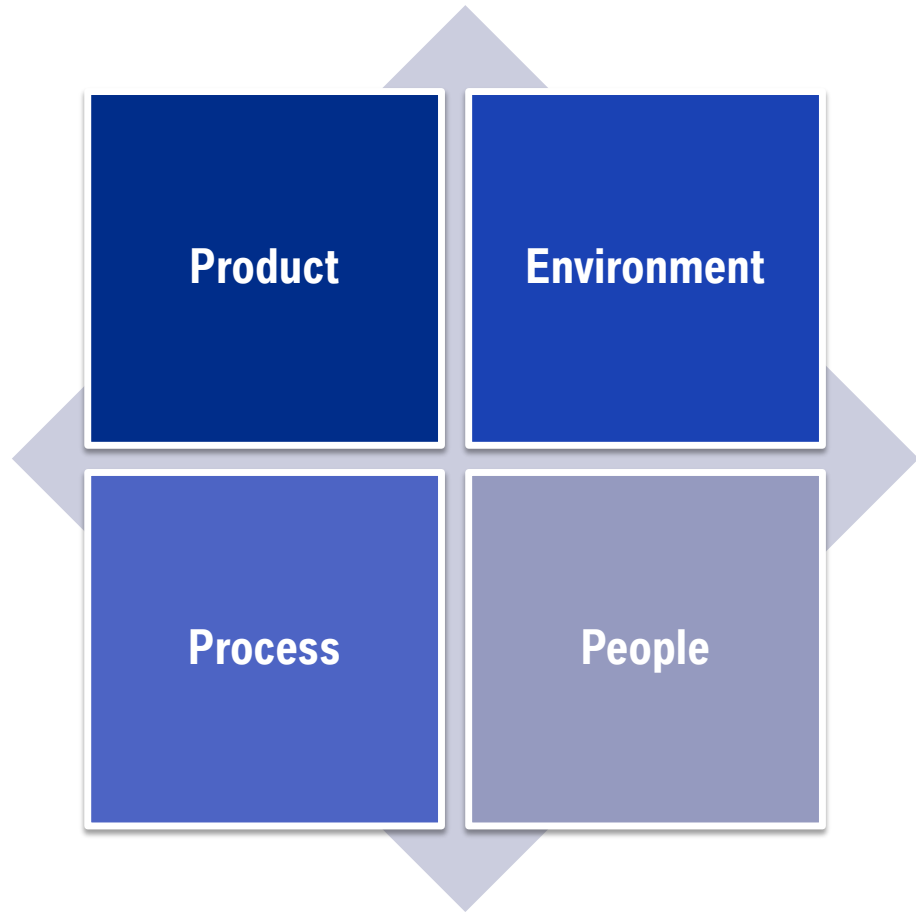
“The more you understand your customers, the clearer things become and the easier it is to determine what it is you should be doing.”

—John Russell, President of Harley Davidson

# The Premium Customer Experience.

## A Multi-Dimensional Landscape.

Part of Future Retail is to support our BMW vehicles (product) that are already considered premium in the customer's mind. Next we must focus on delivering the premium customer experience, which is driven by the other three elements: environment, process and people. In each of these areas, BMW is focused on responding to the modern consumer and leading the industry with a comprehensive approach to "future proof" our dealers.

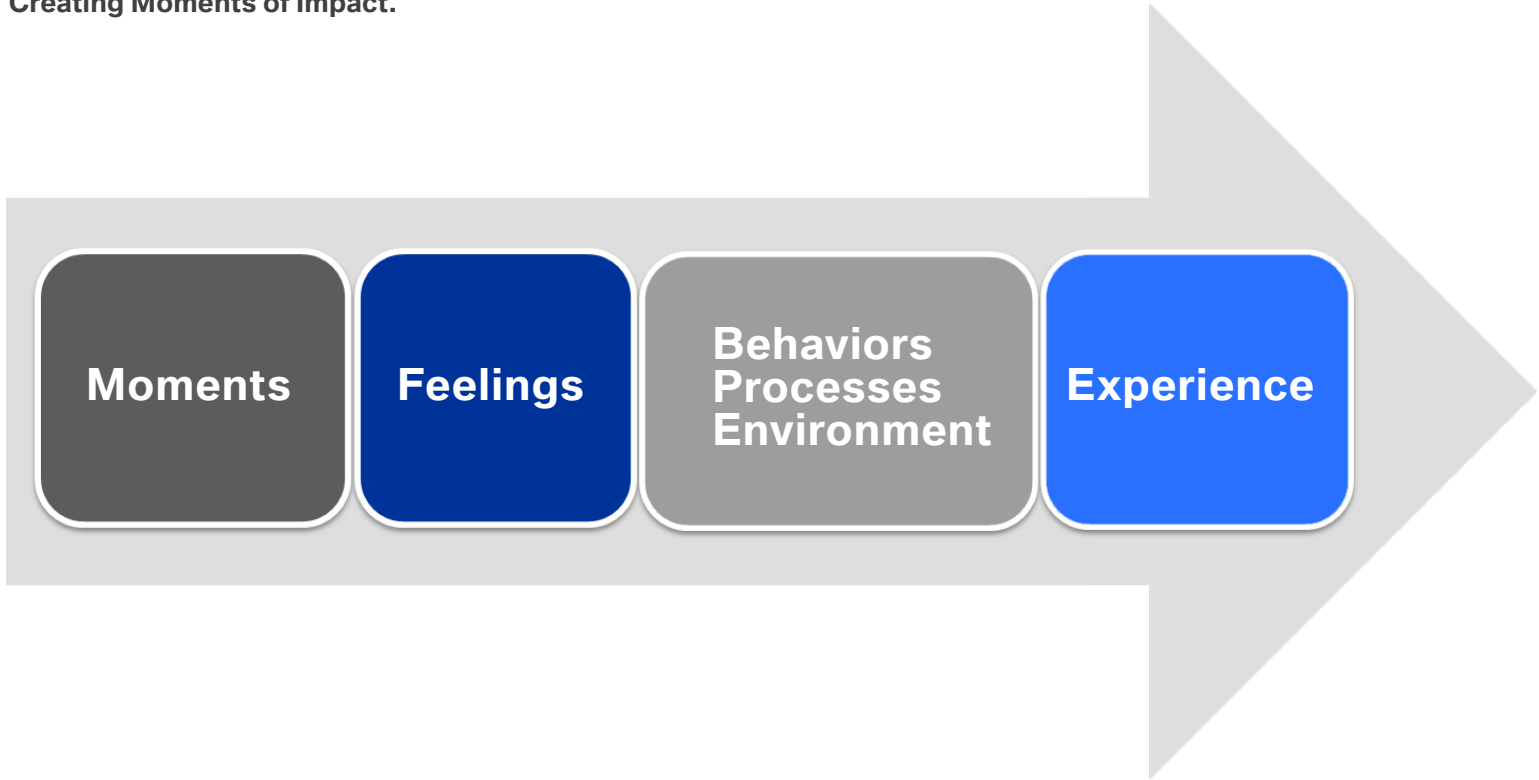


**“Humans relive their experiences as snapshots—not videos.”**

**—Daniel Kahneman, Psychologist**

# The Premium Customer Experience.

Creating Moments of Impact.



**“Customers remember how you treated them long after they have forgotten what you did for them.”**

**—SGEi**

# The Perception of Experience.

## Creating Moments of Impact.

Studies suggest that final experiences (whether positive or negative) are the experiences we most remember. When considering the different ways we interact with our customers online, on the phone or in person, we are building a series of moments that shape our customer's perception and the way they remember their experience. For every customer interaction, there is an opportunity to create a moment of memorable experience—a moment of impact. Our teams are influencing their perception every step of the way—through our behavior, the ease with which they are able to do business with us and through the dealership environment as a whole.

Every element plays a role in how we make our customers feel. This is why it is crucial to establish and enforce very clear standards of service. The Modern Luxury Moments define these standards—the actions, behaviors, processes and environmental elements that allow us to create consistency in delivering a premium experience. With this framework in place, we are poised to successfully deliver moments of impact and create final experiences that are worth talking about and worth remembering.

**“I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”**

**—Maya Angelou, American Poet**



Provide a Warm Welcome

1

Actively participate in the welcoming process; practice 10/5. Stand up when greeting customers. Proper telephone etiquette means answering phones within three rings and asking permission before transferring calls or placing customers on hold.



Explain Products with Passion

2

BMW Genius works seamlessly with Advisors in conducting a needs analysis to determine the appropriate customer journey. Experiences are personalized; recommendations are customized. Sales team is knowledgeable and engages technology in the sales process.



Deliver the Ultimate Product Experience

3

We offer customized test drives to all interested parties! BMW Genius or Advisor offers a beverage, customizes the test drive route, curates music programming and leverages elements of interest to impress and excite the customer.



Close with Confidence

4

Show consideration for the customer's time and needs. Ask where s/he would prefer to complete the sales/F&I process; offer a beverage/snack; leverage technology + dealership amenities to ensure customers are engaged while waiting.



### Handover in Style

5

Plan and prepare for a memorable handover; engage the elements of surprise and delight! Review warranties/services and educate customers on all features that matter most. Escort and introduce customers to dealership and staff.



### Manage Customer Challenges

6

Seize every opportunity to proactively inquire about each customer's service experience before s/he leaves the dealership. Ensure staff members can confidently and consistently apply the elements of E.A.T. when fielding customer complaints.



### Strengthen the Relationship

7

Sales and support staff promote the Encore appointment and ensure successful and consistent follow-up/scheduling of the Encore second delivery within the required timeframe. The experience is memorable and worthwhile for the customer.



### Offer a Fond Farewell

8

Premium service prevails when we say, "thank you!" for the business, for your customer's loyalty and/or for the opportunity to be of service. Demonstrate helpfulness, wish customers well and extend an invitation to return.



## Gaining A Competitive Advantage.

### Commitment is Key.

Just as poet Maya Angelou says, our customers may not remember everything we say or do, but there is one thing customers never forget and that is how we make them feel. Establishing premium standards for team behavior, efficient processes and environmental elements empower us to consistently deliver premium experiences for our customers. Failing to define these standards and deliver on them consistently means mediocrity at best.

In order to successfully infuse each moment with the feelings we seek to create, we must all work consistently and in concert with one another. Everyone must be committed to delivering the premium behaviors outlined in the Modern Luxury Moments, to following BMW dealership-specific processes and to implementing the new EPoS design standards. This is Future Retail, and this is how we win!



# Brand Standards Improve Performance.

## BMW Genius. Technology. Time.

We have learned through national research that automotive consumers are repelled by sales pressure. The modern consumer eschews the discomfort of pressure during the buying experience and will avoid the dealership all together as a result. With the rise of web-based apps, internet sales and in-home delivery, we are challenged to find new ways to inspire customers to physically visit the dealership.

This is one of the reasons why the BMW Genius role was created. Dealerships now have a dedicated team member who is available (without commission incentive) to provide knowledge and insight on products and services, to explain the intricacies of the diverse BMW product range, and to facilitate exciting test drives, unforgettable deliveries and Encore experiences. The goal is to create a stress-free, pressure-free, and sensory-rich experience that draws buyers in rather than deter them.

The benefits of leveraging the BMW Genius role as well as the new EPoS technology are tangible and real. Your dedicated BMW Genius is trained to use the displays and tablets that bring our products to life in ways that are perceived by the customer to be valuable, expected and stimulating. The existence of this role, and the new EPoS technology is an advantage. Champion them for profits and distinction; leverage them to win!

Not to be missed: The Customer Pledge (shown on the next page and highlighted throughout the Playbook) is our promise to make the time our customers spend at the dealership meaningful, educational, relaxing and fun. When implementing refinements among your teams or coaching for increased results, always seek to align the “why” and your feedback with these BMW values.

# The Customer Pledge.



Your time is valuable and we will always respect it.



We will always offer you a test drive and help you find the BMW that fits your needs.



Features and functions will be explained in the time frame and manner you prefer.



We endeavor to service your BMW right the first time, every time.



Your new BMW will be delivered in showroom condition, and after each service, it will be washed and vacuumed.



We will greet you promptly and welcome you into our warm, inviting and comfortable environment.



We will keep you informed of vehicle delivery or service delays.



Alternate transportation will be provided when appropriate.



We will clearly explain all service requirements and charges.



You will be contacted promptly in the method you prefer after each inquiry or visit.

# Utilizing EPoS Elements.

## A Look At What Customers Value.

Modern consumers expect an environment that reflects the premium nature of our products. Customers value spending time in an atmosphere that is stylish, comfortable, clean and organized—one that extends from the service drive and advisor workstations, to the restrooms and customer lounge. Because we are focused on enhancing our customer's time, providing a place to recharge devices or unwind while enjoying a healthy refreshment or snack is critical to their overall experience. Sensory elements like music and scent also play a critical role.

The strategy behind the new EPoS standards (found in any recently renovated dealership) supports what we know our customers expect from a modern luxury retail environment. Regardless of the status of your dealership's renovation, aligning your environment with what our customers value the most is a winning strategy!



# The Ultimate Customer Experience.

## Winning Strategies.

In the following chapters of this Playbook, you will find service standards and strategies for the behaviors, processes and environmental elements that are tied to each of the Modern Luxury Moments—strategies that are proven to help you deliver the ultimate customer experience. These standards were developed from reviewing the last three years of research, customer feedback and dealer insight. At the end of each chapter, you will find links to additional resources as well as opportunities and challenges to add new elements to your dealership's Customer First Plan. By leveraging all the elements of Future Retail, you are “future proofing” your success. Good luck, and have fun!



**“By utilizing all the elements of Future Retail in a consistent and precise manner our customers are enjoying not only the ultimate driving machine, but also the ultimate customer experience.”**

**—Peter Miles, Executive Vice President at BMW of North America**

# Modern Luxury Moments. Provide a Warm Welcome.



## **A Feeling to Remember.**

**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.”**

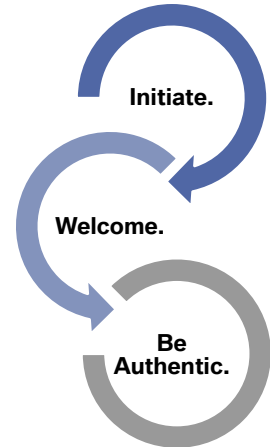
# Premium Behavior Essentials.

Provide a Warm Welcome.

**Initiate** all interactions. Practice the 10-5 Rule, including making eye contact, smiling, verbalizing a warm welcome and thanking the customers for coming to the dealership.

**Welcome** customers within two minutes or less. Stand up when greeting customers, verbalize a premium greeting, introduce yourself and obtain the customer's name.

**Be authentic.** Use a warm tone of voice, smile and be engaging. Demonstrate a polished presence, refined body language and a positive attitude.



# People.

## A Polished Presence.

- Sales teams are uniformly dressed; dealer associates wear a visible name tag and BMW Genius Teams are wearing the proper designated polo or proper attire.
- Sales staff demonstrate a polished presence and refined body language (e.g., clothes are free of wrinkles and/or stains, shoes are polished, no hands in pockets or arms folded, no chewing gum).
- Avoid using monotonous greetings. Instead of, “Hello how are you?” or “How can I help you?” Say, “Good morning and welcome!”



# Process.

## Greeting Customers.



- Staff members are visible in and around the parking lot, exterior dealership areas and at the main reception desk.
- Customers are greeted promptly (within two minutes or less), and sales staff proactively initiates interactions with customers.
- Staff members are actively involved in practicing the 10/5 Rule; make eye contact, smile, and verbalize a premium greeting (e.g., “Good morning and welcome!”).
- Receptionists stand up when greeting customers and come out from behind the desk when directing customers; sales managers, client advisors and other support staff stand up when greeting and closing interactions with customers.
- Staff members introduce themselves during the welcoming moment and ask for the customer’s name; the customer’s name is used throughout the visit.
- Teams use an open hand (no pointing) when directing customers and take at least three steps with the customer when directing them elsewhere.
- Team members use a warm, authentic tone of voice and exude a positive, enthusiastic attitude.
- Sales staff demonstrates interest in customer’s purpose for the visit and proactively seeks ways to offer assistance and/or direct the customer appropriately.

# Process.

## Telephone Etiquette // Appointments.



- Receptionists, sales team and other support staff answer phones within three rings, provide a warm and enthusiastic greeting, thank the customer and introduce themselves.
- A live person answers the phone rather than an auto-response or prerecorded greeting; staff members infuse all telephone interactions with enthusiasm, friendliness, a desire to be of service and a smile!
- Staff members ask permission before transferring a customer to another team member or to a voice mail, as well as before placing a caller on hold.
- Voicemail recordings are up-to-date, and the receptionist team possesses a current list of extensions (and cell phone numbers, when applicable); the list is updated monthly.
- 100% of phone calls are logged; missed calls are tracked, and general calls are monitored; a quality control process is in place to ensure customers are called back within the designated timeframe.
- When pulling up existing customers in the system, obtain his/her name first, and then locate the customer record by phone number or VIN; take time to build rapport during the phone conversation; make telephone interactions personal rather than transactional.
- Sales staff uses scripts and specific verbiage to guide the needs analysis or conversion; this includes emails and other communications used for the Encore program.
- When making appointments or reservations for test drives, aim to provide customers with the date/ time of their choice.
- Offer and send appointment reminders via the customer's preferred method of contact; double-check this information after each new reservation; review the need to bring required documents (driver's license, proof of insurance, when applicable), and encourage customers to arrive prepared and on time.
- Receptionists and Client Advisors plan and prepare for daily appointments; teams are aware of daily scheduling and are ready to greet customers appropriately.

# Process.

## Internet // Website.



- Website is up-to-date and user-friendly; a “meet our team” or similar page exists with contact information listed.
- Social media sites are up-to-date and reflect the goals, objectives, culture and tone of the dealership.
- Promote the availability of online scheduling (via web and/or app) through dealership marketing activities.
- Create an exclusive BMW online community (e.g. where exclusive offers for events are provided to members).
- Respond to Internet leads and/or emails within 15 minutes.
- Employ formal language when composing emails; ensure communications are grammatically correct, relevant, to-the-point and free of errors.
- Deliver attachments via PDF and ensure sizes of 3MB or less.
- Sales team and support staff regularly update customer information in the appropriate CRM.
- Internet sales team and/or support staff consistently transfers client information towards the Client Advisor.

# Optimal Environments.

## Reception // Workstations.

- Phone system and technology are user-friendly, up-to-date and connected to relevant dealership systems.
- Reception desk is located near the main entrance of the dealership and visible throughout the showroom.
- Reception desk is clean and well-organized, visibly free of beverages and/or snacks.
- Reservation areas are devoid of excessive background noise and interruptions.
- BMW POS materials and magazines are neatly presented.
- Interior and exterior areas of the dealership uphold modern luxury standards.



# Optimal Environments.

## Lounge // Restrooms // Recreation.

- A variety of seating and workplace choices exist in/around the customer lounge.
- Provide entertainment options via large TVs or tablets.
- TVs are set to a general news channel or stream current movies; volume is turned down low or set to off with closed captioning.
- WiFi is readily available without the need for additional login or password requirements.
- Provide cards with access and password information to all guests utilizing the waiting lounge.
- Offer a variety of fresh, locally-sourced, healthy and high-end snacks (e.g. fresh/dried fruit, yogurts, almonds, trail mix, pretzels, chocolate, gummy bears or low fat popcorn).
- Offer a selection of hot and cold premium beverages and provide the appropriate food and beverage accoutrements (e.g. napkins, cups, plates, etc.).
- Ensure all snacks and foods are accompanied with the appropriate accoutrements (e.g. napkins, cups, spoons, etc.). Set-up should be organized and clean at all times.
- Ensure the lounge area is comfortable and clean, smells fresh, temperature is set to a comfortable level and ensure relaxing background music plays at an appropriate level.
- Provide a sampling of reading materials (e.g., BMW/dealership magazines, newspapers and lifestyle magazines), keep materials organized throughout the day and regularly discard older editions. Newspapers must be for the current day, and magazines should be for the current month.
- Stock a variety of chargers in the lounge or reception desk area.
- Restrooms are clean, counters are wiped dry, area smells fresh and restrooms are well-stocked with the appropriate supplies and amenities.
- All fixtures are in proper working condition.
- Provide a child-friendly area that is clean and safe; offer a selection of age-appropriate educational and fun activities either live or via tablet.

# Optimal Environments.

## Dealership Exterior.

- Provide clear and visible signage for customer parking areas; provide an appropriate number of spaces are available for customer parking.
- Exterior lighting functions properly; walkways are illuminated at dusk.
- Entryways are well-maintained and free of trash, debris and/or dirt.
- Garden and landscaping is clean, well-maintained and free of debris; all plants are healthy.
- Designated smoking areas include a proper receptacle for cigarette butts; receptacles are emptied regularly; ensure staff does not use customer smoking areas.
- External trash receptacles are well-maintained and emptied regularly.



# Winning Strategies.

## Try This.

### **EVERYONE IS A GREETER.**

Utilize BMW Genius, Client Advisors and Receptionists to ensure every customer is greeted within two minutes of entering the Dealership. When everyone is actively involved in practicing the 10/5 Rule, the environment will feel warm and inviting, the type of place where customers will want to hang out.

### **LEVERAGE NEW TECHNOLOGY.**

Millennials love technology. BMW Genius and Client Advisors utilize tablets to showcase models, features and customized details to build the perfect BMW vehicle that will fit the customer's lifestyle and needs.

### **DID YOU KNOW?**

25% of potential BMW customers do not purchase because of how they are treated at the dealership. Can we afford to lose that many customers because of a poor first impression?

**“You can learn a lot about a person and a place within the first ten seconds of meeting them or it. It’s amazing so many people and places leave this impression to chance.”**

**—SGEi**

**Modern Luxury Moments.**  
**Explain Products with Passion.**





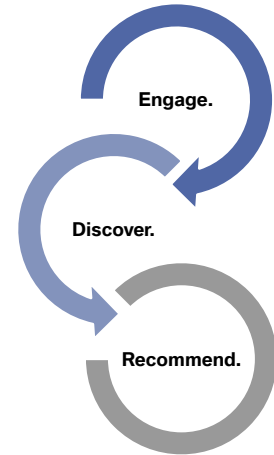
## **A Feeling to Remember.**

**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.”**

# Premium Behavior Essentials.

Explain Products with Passion.



**Engage** customers in meaningful conversation (e.g., observe, ask, listen) so that you can personalize the interaction and help to create a feeling of being known.

**Discover** what and who is most important to the customer; always learn the customer's name and use it often during the visit.

**Recommend** products, packages, options and offers based on individual customer lifestyle and needs.

# Process.

## Needs Analysis.



- The BMW Genius or appropriate team member determines whether the customer has a concrete intention to buy or a general interest/desire to browse.
- In cases of general interest, the appropriate staff member introduces the customer to the BMW Genius (or Client Advisor, if applicable), ushers the customer to the relevant area(s) of the dealership and/or offers a tour of the facility.
- In cases when the customer has a clear intent to buy, the appropriate team member introduces the customer to a Client Advisor.
- Should a Client Advisor be unavailable, the BMW Genius engages the appropriate next steps with the customer until a Client Advisor can join or take over.
- A needs analysis is performed, and the customer's timeframe for the visit is obtained.
- The customer's name, purchase history and other personal preference details are used to personalize the visit.
- Spend the appropriate time engaging customers in meaningful conversation to determine who and what is most important to them.
- Inquire about budget range in a respectful, appropriate and authentic manner.

# Process.

## Presenting Products of Interest.



- All recommendations and offers are based on the customer's unique lifestyle and needs.
- Provide an individual product presentation at the vehicle or other BMW product that best corresponds to the customer's personal needs and wants.
- Leverage the BMW Genius role for all vehicle presentations and product reviews; engage the Client Advisor when appropriate.
- Invite customers to have a hands-on experience; encourage them to sit inside, touch the gadgets and fully experience the product.
- Share your passion for the brand as well as for features and benefits of the vehicle; let your passion shine through.
- Offer advice and communicate the benefits of optional equipment, packages, upgrades and accessories.
- Be familiar with competitor products and services; highlight the benefits and value proposition of the BMW brand.
- Use the tablet to build out the vehicle and to record the customer's input and feedback.
- Use the VPP to showcase the final vehicle on a large screen.
- BMW Genius introduces the customer a Client Advisor once the needs analysis and vehicle presentation(s) are complete.

# Optimal Environments.

## BMW Genius Workstations.

- Position the BMW Genius workstation in the middle of the dealership showroom so that s/he has easy access to customers and products; avoid using the area as an administrative workspace.
- Client Advisor and BMW Genius workstations are clean, well-organized and visibly free of beverages and/or snacks; trash receptacle is emptied regularly.
- BMW Genius is equipped at all times with an iPad/Tablet and is adept at configuring vehicles and connecting to the VPP.

# Optimal Environments.

## Showroom Displays.

- Vehicle displays are oriented to the customer; displays are set up in a gallery roadway configuration and are in an offset side-by-side line up; a variety of 8-10 models and colors are on display. (Note: this number will vary depending on SPG.)
- The spacing of vehicles allows for customers to fully open car doors and walk around them without feeling crowded.
- M-Certified dealerships have M-Series vehicles on display and the appropriate M-branded elements are in-place and visible including: M-Super Sign, Communication Wall with Accessories Case, iPad Spec Stand, White Showroom Vehicle Platform, M-Communication Panel and Seating Area. (Seating area is preferred but considered optional.)
- BMW i Series vehicles are displayed in the designated area, and all branded elements of the i Series display are in place including: i3 and i8 vehicles, dedicated wall box, lounge area, price stele and LED screen.
- Batteries are charged, display vehicles are fully-equipped, Sirius XM radio enabled (when applicable), all products are clean and in excellent condition.
- VPP station(s) are available in easily accessible locations.
- Large digital screens are visible and showcase products, services and special campaigns.
- Smaller digital signage next to the vehicle provides product and price information for customers.

# Optimal Environments.

## Showroom Area.



- Client Advisor desks/workstations are located within clear view of the showroom floor with easy access to vehicles and customers arriving/ browsing the showroom.
- Showroom areas are clean and well-organized; temperature is set to an appropriate level, scent and sound elements uphold modern luxury standards. (e.g., scent-air program in place, relaxing music with no words).
- Sound system (public address system) is not used for constant internal communication, paging or announcements.
- A sample wall is available and contains the most up-to-date color and upholstery templates which can be removed individually for all exhibited vehicles.

# Winning Strategies.

Try This.

## **ACTIVATE TECHNOLOGY AND SOCIAL MEDIA.**

Find new ways to add value for your customers. Have the BMW Genius team create videos that promote, explain or introduce different products, packages or specific dealership amenities. Include calls to action at the end of each video that link viewers back to the dealership's website and team. Upload them to your dealership's dedicated Facebook page or YouTube channel. It's a great way to educate and excite your current and potential customers and your dealership staff too!

## **DID YOU KNOW?**

According to a recent report by McKinsey & Co., dealerships will need to employ new technologies such as mobile apps, multimedia walls and 3D configurators to provide a meaningful customer experience.

**“Customers don’t care how much you know until they feel how much you care.”**

**—Theodore Roosevelt**



**Modern Luxury Moments.**  
Deliver the Ultimate Product Experience.



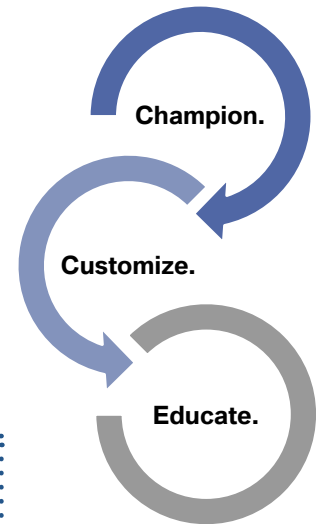
## **A Feeling to Remember.**

**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.”**

# Premium Behavior Essentials.

Deliver the Ultimate Product Experience.



Be a **Champion** for the test drive and make it available to all interested parties.

**Customize** the test drive experience! Leverage all features of the car, and focus on ways to enliven the senses (e.g., customize music stations, test drive routes, etc.). Make the test drive meaningful and stimulating.

**Educate** customers by sharing the value of options, upgrades, accessories and BMW aftersales services including the benefits of BMW Certified Technicians and Vehicle Specialists.

# Process.

Deliver The Ultimate Test Drive.



- Teams are champions for the test drive and make it available to all interested parties. (Conversely, never push a vehicle unwanted by the customer).
- Test drive vehicles are clean, have a full tank of gas or are fully charged, are devoid of private items and are parked in the direction in which the test drive begins.
- Client Advisor and/or BMW Genius introduces himself/herself and uses the customer's name throughout the visit.
- Spend up to 15 minutes providing an overview of the vehicle, explaining specific vehicle features based on learned customer interests and needs; review the test drive process.
- Obtain the required customer identification (e.g., a valid driver's license), and review the terms and conditions of all required documents and formalities (e.g., contract, usage conditions, signature, etc.).
- Sales staff and/or BMW Genius customizes the test drive route based on the customer's normal driving habits/routines; a music selection is curated based on customer preferences; bottled water is offered before departure.
- Client Advisor and/or BMW Genius consistently uses the tablet to build out the preferred vehicle(s) (for the test drive) and records any customer preferences, input and/or feedback.
- Be mindful of the customer's time and spend no more than 30 minutes finalizing vehicle features/configurations prior to the test drive.
- Leverage all possible features of the vehicle, and aim to provide an unforgettable test drive experience.

# Process.

## Post-Test Drive.



- Client Advisor and/or BMW Genius asks for and discusses customer feedback; a tablet is used to record relevant details.
- Evaluate the customer's satisfaction according to expectations, and clarify customer needs in order to evaluate purchase intention and/or perform further needs analysis.
- BMW Genius takes the appropriate time to perform a thorough handover of the customer to a Client Advisor (e.g., use customer name, provide customer feedback preferences, etc.).
- Client Advisor or other sales support staff utilizes the tablet to record customer input and feedback, to build out the desired vehicle and to provide payment information and options.
- Use the VPP to present the final vehicle based on the needs analysis, buying motives and test drive outcome; customer preferences are reconfirmed.
- Save the configuration and grant access to the customer via his/her preferred channel (e.g., email or My BMW).
- Provide a printed copy of the vehicle's specifications, pricing, etc. to the customer.

# Optimal Environments.

Comfortable // Stress-free.

- Advisor workstations and areas are clean, well-organized and visibly free of food and beverages; trash receptacles are emptied throughout the day.
- Music plays at an appropriate volume in the background, the temperature is set to a comfortable level; the environment smells fresh, and the overall ambiance is calm and harmonious.
- Customer seating options are located around a small table with a clear view of the large digital screen; seating options are clean and comfortable.
- Tablets are easily connected to the digital screen to allow for vehicle configuration.



# Winning Strategies.

Try This.

## **DESIGNATE A SEPARATE LOCATION FOR THE i SERIES.**

Enhance the presentation and status of the i-brand experience by showcasing i Series vehicles in a separate and designated location. Not only does this showcase the singularity of the product, but it creates a singular experience for customers too!

## **FIND THE WAY TO A CUSTOMER'S HEART.**

More than ever, dealerships are getting creative in cultivating those distinctive quality that makes them stand out from the pack. During the test drive, BMW Genius and Client Advisors customize music selections and driving experiences based on the customers lifestyle and preferences. They are also empowered to drive through a local coffee drive-through and get the prospective customers their choice of premium beverage.

## **DID YOU KNOW?**

83% of American adults drink an average of three cups of coffee per day. Making a quick stop at a coffee shop drive-through during the test drive is probably a gesture they will enjoy and accept.

**“If it’s not about me, then it’s not for me!”**

**—SGEi**

# Modern Luxury Moments. Close with Confidence.





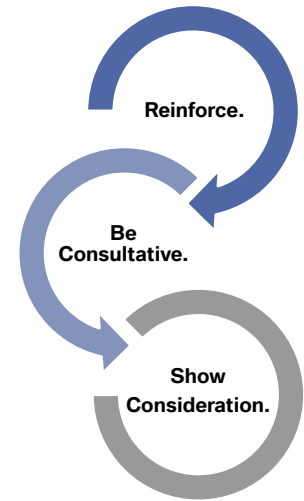
## **A Feeling to Remember.**

**Close with Confidence.**

**“I feel confident about doing business with BMW—my advisor was a great confidant and helped me arrive at the best 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!”**

# Premium Behavior Essentials.

Close with Confidence.



**Reinforce** customers' decisions and customized product choices; build confidence by providing genuine and specific compliments and feedback.

**Be consultative** by thoroughly explaining contractual elements and answering all questions; be honest and transparent; support the customer in making a clear decision.

**Show consideration** for the customer's comfort and time; provide a calm environment devoid of interruptions or loud noises; leverage ambiance to create a feeling of being well-cared for (engage the five senses, cleanliness, organization, coffee, music, etc.); aim to complete sales negotiations within 15-45 minutes.

# Process.

## Negotiating the Deal.



- Advisors consistently offer to write up the deal after the test drive; aim to close negotiations within 30 minutes.
- Ask the customer where s/he would be most comfortable discussing pricing elements or conducting negotiations.
- Escort the customer to the appropriate area, gesture with an open hand and stand when greeting and/or inviting customers to take a seat in the advisor workstation area.
- Offer amenities (e.g., preferred beverage or snack, phone/tablet chargers, time to check emails or voice messages, a restroom break).
- Understand that customers prefer to negotiate with only one advisor who has full authority; managers are enlisted to serve VIP or A-list customers.
- Present and explain the final offer and/or options using the tablet; reinforce individual points from the needs analysis.
- Create a pressure-free environment; engage the appropriate techniques in responding to or overcoming objections.
- Never change an advertised or previously-communicated price (except to lower it).
- A printed copy detailing the offer is provided to each customer.
- Prepare a BMW/dealership branded folder which includes team business cards, marketing materials, sample letter and finance information.

# Process.

## Following-up with Customers.



- In the event a customer leaves the dealership without making a deal after a test drive or during sales negotiations, Client Advisors provide a thorough and sincere closing which includes thanking the customer for his/her time, providing a business card, obtaining customer contact information and confirming that s/he will be following up within 24 hours.
- Advisors consistently follow-up with non-buying customers within 24 hours (using the preferred method of contact) and aim to establish appropriate next steps and/or schedule a second appointment.
- Advisors customize follow-up contact by using information gathered during the previous visit and aim to reconnect the relationship genuinely and sincerely.
- If the customer cannot be reached, Client Advisors consistently follow-up again within three days.
- Customer feedback: reason for postponed purchase or lost sale is recorded in the appropriate CRM.
- When and if a second negotiation occurs, review and evaluate all information gathered and/or distributed during the previous visit.

# Process.

## Customer Handover to Finance.



- Brief customers about F&I procedures and financing options in advance.
- Always escort the customer to the F&I area.
- Aim to keep waiting times between contract negotiation and finance to 15 minutes or less.
- In the event of longer wait times, ensure customers are engaged while waiting; leverage dealership amenities, technology, the BMW Genius, retail environments, service areas or the potential to use the time to review the delivery process and/or additional vehicle features.

# Process.

## Finance and Insurance.



- F&I Manager stands up and comes out from behind his/her desk to greet and welcome customers.
- Staff aims to complete the F&I process within 30 minutes.
- For lease or loan customers, review relevant Financial Services information and any additional processes; initiate the application.
- Maintain a pressure-free sales environment for the customer.
- Educate customers on financing solutions, and clarify the value proposition of products and warranty programs.
- Be consultative; clearly explain programs and financing options; be honest and transparent; check for understanding and review details as needed.
- Before signing, provide a final presentation of the comprehensive offer; ensure details are correct and that all contractual documents are completed correctly and signed as required.
- The dedicated F&I Manager or Client Advisor is the preferred point of contact for the signing; finance director acts as support only.
- Aim to complete the F&I signing process within 15 minutes.
- Congratulate the customer on his/her signing; celebrate with the designated ritual or gift; ensure consistent verbiage and presentation.
- Provide a printed contract in a BMW/dealership branded folder along with business cards.
- Reinforce the personal commitment and attention the customer will receive from the dealership: the dealership Owner, Manager, or Sales
- Director congratulates and personally thanks the customer for his/her business.
- Document all important customer information in the appropriate CRM.

# Process.

## Finance to Vehicle Delivery.



- Customer handovers from F&I to vehicle delivery take place within 15 minutes (not to exceed 30 minutes).
- F&I Managers escort customers to the lounge area and offer amenities, as needed.
- Introduce (or re-introduce) the customer to the BMW Genius prior to the vehicle delivery; review and ensure that waiting customers are updated regularly. (Avoid providing more than three updates.)
- Determine whether the customer has license plate requirements, and offer to register the vehicle.
- Provide customers with informational material on his/her new vehicle, and present a miniature version of the customer's car to remind him/ her of the day the purchase was made.
- Organize a delivery appointment if the wait exceeds thirty minutes; ensure appointment is scheduled based on the customer's date and time preferences.
- Initiate an appointment reminder via the preferred method of contact, and confirm the name of the associate who will handle the delivery.

# Optimal Environments.

## Offices // Workstations.

- Staff offices and workstation areas are private and easily accessible.
- Areas are clean, well-organized, visibly free of beverages and/or snacks; trash cans are regularly emptied.
- Consideration is made for all sensory elements (e.g., scent, temperature, music, etc.); the environment is calm and serene.
- Chairs and seating options are clean, comfortable and in excellent condition.



**“A sale is not something you pursue; it’s what happens to you while you are immersed in serving your customer.”**

**—Unknown**



# Winning Strategies.

Try This.

## **CREATE CEREMONY AROUND GIFTS.**

Whether it's offering the BMW-branded pen that is used to sign purchase documents, or whether another type of accessory is packaged as a gift, give some thought to the timing, verbiage and manner with which the gift is offered. This moment is prime for creating a memorable experience. But it's all in the way that gifts are offered. Even small offerings can be made to feel big when the right ceremony is created.

## **DID YOU KNOW?**

In a recent 2014 Autotrader survey, more than 75% of customers indicated they would prefer to fill out credit applications and other forms online at home. The time it takes to complete paperwork is one of the most frustrating aspects of the car-buying experience.

# Modern Luxury Moments. Handover in Style.



## **A Feeling to Remember.**

**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.”**

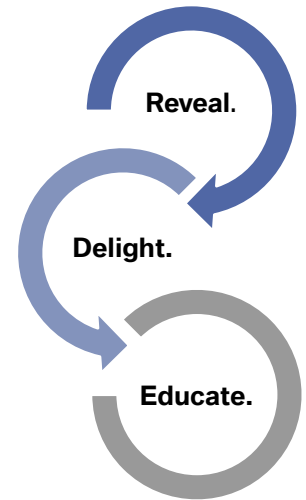
# Premium Behavior Essentials.

## Handover in Style.

Plan and prepare for a memorable **Reveal**. Ensure cars are ready for delivery in showroom condition; honor the time-frame available for the handover process; make it personalized.

Leverage the elements of surprise and **Delight** by celebrating the occasion with the delivery of a personalized gift, bottle of water or dealership branded treat and/or BMW empowerment tool.

Use the handover as an opportunity to **Educate** the customer about the vehicle. Aim to make the experience worthwhile, and find ways to teach something new.



# Process.

## Vehicle Deliveries.



- Ensure all resources are utilized to create a memorable delivery experience; leverage the BMW Genius, Client Advisor or Delivery Expert to provide support.
- Aim to complete the delivery process within 30-60 minutes as dictated by the customer's preferences; customize each experience by finding "the right amount of time" to spend on the delivery.
- Utilize a checklist as well as the customer's unique needs as a guide in delivering a consistent, thorough and memorable handover experience.
- Prepare any paperwork before the scheduled delivery (when possible); have the vehicle ready for the customer in showroom condition.
- BMW Genius, Client Advisor or Delivery Specialist consistently reviews relevant BMW apps, and asks for approval before downloading software to the customer's smartphone or other device.
- Explain Bluetooth capability and connect the customer's device; review navigation and audio system functionality; review the reference guide and owner's manual.
- Spend the necessary time to ensure that customers understand the warranty and maintenance policies.
- Introduce the customer to key members of the Service Department; explain the benefits of TeleService and the BMW Encore program; encourage customers to take advantage of additional educational opportunities such as dealership visits, phone calls, online videos, My BMW, Genius Everywhere, etc.
- Set up BMW Encore appointments immediately; offer to send a reminder via the customer's preferred method of contact.

# Optimal Environments.

## Delivery Areas.

- Vehicle delivery areas are clean, well-organized and allow for ample space to conduct presentations and explanations.
- Delivery area smells fresh, the temperature is set to a comfortable level and relaxing music plays in the background; the public address system should not be heard in this area.
- Lighting options allow for enhancement of vehicle presentation depending on the time of day.
- Provide a communication display with the customer's name.
- Comfortable seating is available when/if needed.



**“Sometimes you will never know the value of a moment until it becomes a memory.”**

**—Dr. Seuss**

# Winning Strategies.

Try This.

## **GET CREATIVE WITH PHOTOS.**

Take a photo of the customer's new car and send the photo along with a text message that says something to the effect of, "Your new car is waiting to be taken home!" Your customer (who may be just finishing up with finance or waiting briefly in the dealership) will be surprised and delighted. Get creative with photos and leverage technology as a way to deliver a handover in style!

## **DID YOU KNOW?**

Psychologist Robert Plutchik's research on the "theory of emotion" suggests that the element of surprise elevates whatever emotion we are already feeling. Customers are already happy and excited with their new BMW vehicle, but it is a surprise gift or experience when they pick up their car that they will remember forever.

# Modern Luxury Moments. Manage The Customer Challenges.





## **A Feeling to Remember.**

**Manage the 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.”**

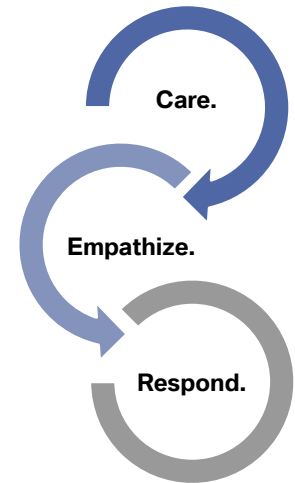
# Premium Behavior Essentials.

Manage the Customer Challenges.

Show that you **Care** about the customer's experience by proactively checking in before s/he leaves the dealership. Own any challenges or issues that are brought to your attention.

**Empathize** by putting yourself in the customer's shoes. Normalize customer reactions by first empathizing before apologizing. Always thank the customer for taking the time to communicate the issue.

**Respond** by initiating resolution and/or by giving options. Engage the appropriate people to ensure the right solution. Confirm the customer's satisfaction, and complete any necessary follow-up.



# Process.

## The Magic Formula.



- Embrace challenges when they come up; see them as opportunities to strengthen the relationship; always be willing to go the extra distance in turning around a customer's experience.
- Listen empathetically and do not interrupt the customer; allow him/her to communicate the whole issue.
- To deliver sincere empathy, use words like, "I understand" and "I would feel the same way"
- Reassure the customer that his/her complaint or frustration is valid; never deny the presence of an issue if the customer is verbalizing one.
- The appropriate timing of an apology comes only once you have properly empathized; ensure the apology is well-timed and heart-felt.
- Let the customer know "this is not the experience we aim to provide" if the dealership is at fault or for any disappointment.
- Thank the customer for bringing the issue or challenge to your attention.
- Verbalize your intentions to make the experience right; either provide the solution or give options; let the customer know that you can help.
- Use your experience, what the customer says and dealership processes to deliver the best possible solution; engage support whenever needed.
- Follow-up and follow through all the way on the resolution or promised deliverables; check back with the customer to ensure satisfaction.
- Document all challenges and important information in the customer record using the appropriate CRM.
- Ensure the customer receives special attention upon her/his next visit.

# Optimal Environments.

Comfortable // Stress-Free.

- Team members move customers to a private area to speak further about any challenge that might have arisen during her/his experience, when and if appropriate.
- Team members provide a calm, comfortable atmosphere devoid of interruptions and loud noises; team members verbally assure customers that their aim is to create a feeling of being well cared for.



**“To handle yourself, use your head; to handle others, use your heart!”**

**—Eleanor Roosevelt**

# Winning Strategies.

Try This.

## **OFFER IN-HOUSE PREMIUM COFFEE SERVICES.**

One of the benefits of having a company like Starbucks provide your business with a coffee program is that when customer challenges arise, you've got a built-in bonus remedy that is sure to please. Empower the staff to buy coffee or offer a gift card whenever appropriate. The gesture goes a long way for customers, and just like Starbucks says, "The only thing better than enjoying a cup of coffee is offering one to others."

## **BUILD LOYALTY WITH BMW EMPOWERMENT TOOLS.**

Using BMW empowerment tools (e.g., I'm Sorry card) helps to dampen any negative effect of a poor service experience or delay. Customers appreciate the recognition and thoughtfulness; it shows that you're trustworthy and are worthy of being forgiven.

## **DID YOU KNOW?**

Many customers who experience a problem never say anything to alert the company that a problem has occurred. The best way to ensure you know of a problem occurring or about to occur is to ask your customers throughout their experience if they are comfortable, if they need anything and how they are doing.

**Modern Luxury Moments.**  
**Strengthen the Relationship.**



## **A Feeling to Remember.**

**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!”**

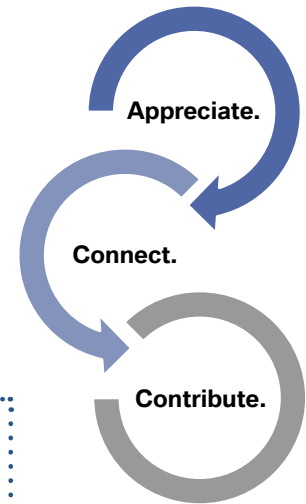
# Premium Behavior Essentials.

Strengthen the Relationship.

Proactively show that you **Appreciate** your customer's business; use hand-written notes to demonstrate thoughtfulness, express gratitude and acknowledge that your customer has choices.

**Connect** with customers a minimum of two times per year; make the contact relevant and meaningful; be community-focused; understand how events and social media contribute to the customer's unique interests, lifestyle needs and wants.

Ensure your dealership's social media activity and other relationship building actions **Contribute** something meaningful to the customer's life (e.g., knowledge, inspiration, community, gratitude, fun, etc.); be part of the conversation.





# Process.

Online // Community // Connect.



- Monitor, manage and maintain your dealership's online reputation; ensure the perception of the dealership's brand is aligned with a premium brand experience.
- Promote the dealership as a community hub—as an enjoyable place to come and hang out.
- Use relationship tools to stay connected during holidays, anniversaries and birthdays.
- Invite customers to events; ensure alignment with lifestyle preferences and interests.

# Process.

## Follow-up // BMW Encore.



- Contact the customer within 24 hours of vehicle delivery; ensure 100% satisfaction with the sales experience.
- Manage any customer challenges or frustrations.
- In the event of receiving negative feedback, engage the appropriate steps of Manage Customer Challenges; have a manager or sales director conduct a separate follow-up call.
- Reconfirm the BMW Encore appointment; when possible, confirm the appointment before the customer leaves the dealership.
- Aim to perform the second delivery within 90 days.
- Contact the customer to confirm appointment duration, focus of education and who will be joining; record details in the appropriate CRM.
- BMW Genius or Delivery Expert performs the second delivery.
- Sales staff follows up twice a year with customers outside of a normal sales or service visit, birthday or holiday.
- When contacting customers, always use the customer's preferred method.

# Optimal Environments.

## Parts and Retail.

- Champion the lifestyle boutique, accessories and parts departments; be familiar with seasonal merchandise.
- Stock the retail area with the latest product offerings; display accessories in an organized and visually enticing way.
- Curate displays and stock merchandise seasonally; provide a robust selection of items; leverage lighting options to enhance the retail displays of different items throughout the day.
- Create a monthly accessories/product combination special, pull together a few different items that complement each other well, then promote monthly specials via email, newsletters and/or social media.
- Lifestyle/Boutique area presents well and provides ample space for comfortable viewing and access to items.
- Parts and Retail Area smells fresh; the temperature is set to a comfortable level; relaxing music plays in the background; and the general area is clean and well-organized, visibly free of beverages and/ or snacks.

**“The meaning of things lies not in the things themselves, but in our attitude towards them.”**

**—Antoine de Saint-Exupéry**

# Winning Strategies.

Try This.

## **THE ENORMOUS POWER OF THE HANDWRITTEN POSTCARD.**

It is likely that a customer who receives a handwritten note will be so impressed that s/he will publicly write about it through an online review, social media or blog post. This type of public testimonial provides infinite residual returns. Years later, the post will still be in existence and generating traffic your way. Showing how much you appreciate your customer's business by sending a handwritten note is a relatively low cost investment, but the returns are enormous when you consider that almost half of all purchase decisions are made because of word-of-mouth referral! And the beauty of a postcard? The space to write your message is relatively small, so you don't have to be Shakespeare to participate.

## **BMW ENCORE AND BMW GENIUSES ARE THE PERFECT PARTNERSHIP.**

Let's face it, after 30 days of driving any given BMW vehicle, a person is bound to have a question or two. Instruction manuals and online tutorials are great, but nothing beats a personalized session with a dedicated BMW Genius to get your product knowledge revving. They know the product inside and out and are skilled at empowering customers to experience everything their vehicle has to offer. And when you throw in a gas top-off or a gift card, it makes the complimentary return visit simply irresistible!

## **DID YOU KNOW?**

Most BMW customers never utilize all the features of their new vehicle, because they do not know they exist. BMW Encore is critical to customer satisfaction.

# Modern Luxury Moments. Offer a Fond Farewell.



## **A Feeling to Remember.**

**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.”**

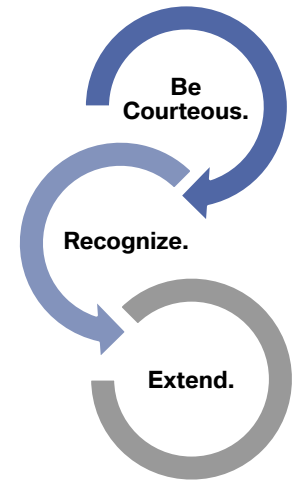
# Premium Behavior Essentials.

Offer a Fond Farewell.

**Be courteous.** Proactively check for satisfaction and the need for additional assistance before customer interactions draw to a close and before customers leave the dealership.

**Recognize** your customer's time and the opportunity to be of service. Thank them for their time and loyalty.

**Extend** an invitation to return. Provide customers with a business card, and encourage them to contact you with questions. Always be sure to wish your customer well (e.g., "Have a great weekend!").



# Process.

## Impactful Endings.



- Sales process is completed within 120 minutes and never exceeds 180 minutes.
- Team members are visible in and around the parking lot, exterior dealership areas, on the showroom floor, at the main reception desk and where customers regularly depart.
- Staff proactively checks for satisfaction and makes sure that all customer needs have been fulfilled before drawing interactions to a close.
- Use the customer's name during the farewell moment.
- Sales team members (including managers and receptionists) who are seated at or behind a desk consistently stand up and come out from behind desks when closing interactions and/or directing departing customers.
- Use an open hand when directing customers, take at least three steps and/or accompany customers all the way to their vehicle whenever possible.
- Demonstrate helpfulness by opening doors, carrying personal items and extending the appropriate courtesies.
- Acknowledge that your customer has choices; verbalize your gratitude for the opportunity to be of service whether the customer has purchased or not.
- Sales staff extends a well wish and all customers are invited to return regardless of whether they purchased or not.
- Demonstrate a polished presence, refined body language and a positive attitude; use a warm, authentic tone of voice and smile!



# Optimal Environments.

## Dealership Exterior // Exits.

- Provide clear and visible signage to exit and to access street directions.
- Exterior lighting functions properly; walkways and driveways are well illuminated at dusk.
- Exit areas of the dealership are well-maintained and free of trash; a schedule exists for cleaning and special attention is paid to ensuring organization and cleanliness for busy periods of the day.
- Garden and landscaping is clean, well-maintained and free of debris; all plants are healthy.
- Designated smoking areas include a proper receptacle for cigarette butts; ensure team members do not use customer smoking areas.
- External trash receptacles are well-maintained and regularly emptied.

**“Customers remember how you treated them long after they have forgotten what you did for them.”**

**—SGEi**

# Winning Strategies.

## Try This.

### **MAKE IT MEMORABLE.**

Staff members sign thank you cards or provide a bottle of water for the road. This creates a feeling of being well-taken care of and is a small way of saying, “Thank you for the business, we appreciate you!” The final moment impacts the customer’s overall perception of the experience more than all the other moments combined; ensuring the final moment has impact is vital. Leaving a small handwritten card in the cup holder is a simple and inexpensive way to make the visit feel worthwhile and meaningful.

### **POLISH THE ROUNDEL.**

As a final gesture before a customer pulls away, take out that handkerchief you keep stuffed in your pocket and give the vehicle’s roundel a final polish. It’s the ultimate touch that makes customers feel that you’re taking excellent care of both their vehicle and them! And it’s a powerful final gesture to make as you deliver a fond farewell.

### **DID YOU KNOW?**

While a great first impression is important to making a sale, it is a great last impression that will make them look forward to coming back.

# Thank You.



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Customer First  
Plan

Sales Playbook



The Ultimate  
Driving Machine®

BMW i8