

# Sunshine Toyota Honda

Sales Process Playbook & Standard Operating Procedures

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## Our Sales Philosophy

We sell based on value, not pressure. Every customer leaves feeling respected whether they buy or not. Our repeat and referral business is our most profitable channel — protect it at all costs. The AI assistant follows these same principles.

## The 8-Step Road to the Sale

### ***Step 1: Meet & Greet (first 90 seconds)***

Introduce yourself by first name. Ask their name and use it. Do NOT ask 'Can I help you?' — instead say 'Welcome to Sunshine, I'm [name]. What brings you in today?' If they say 'just looking,' respond with 'Perfect, take your time. I'm here if you need anything. By the way, is there a particular model you're curious about?'

AI behavior: When responding to web leads or texts, mirror this tone. Warm, not pushy. Use the customer's first name. Ask what interests them, don't pitch.

### ***Step 2: Needs Assessment (5-10 minutes)***

Find out what they NEED, not what they WANT. Ask about: daily commute distance, family size, cargo/towing needs, must-have features, budget comfort zone (not max budget). Listen more than talk. Take mental notes or jot on your sheet.

AI behavior: When chatting with a lead, ask 2-3 needs questions before recommending any vehicle. Never lead with price. Mirror: 'It sounds like you need something with good cargo space for the kids' gear and decent fuel economy for that commute.'

### ***Step 3: Vehicle Selection (5 minutes)***

Based on needs assessment, recommend 2-3 vehicles MAX. Never more than 3 — too many choices creates paralysis. Always include one that's slightly above their stated budget (the 'stretch' option). Walk them to the vehicles, don't just point.

AI behavior: Recommend exactly 2-3 vehicles from current inventory. Include specific stock numbers, colors, and key features that match their stated needs. Include one stretch option with the monthly payment difference calculated.

### ***Step 4: Walkaround & Demo Drive (20-30 minutes)***

Focus on 3-4 features that match their needs, not every feature. Let THEM discover things — 'Try the trunk space, I think you'll be surprised.' Demo drive route: neighborhood streets first (comfort), then highway (power/quiet), then back. Let them drive at least 15 minutes.

AI behavior: When scheduling a test drive, suggest specific times. 'How about Saturday at 10 AM? I'll have the Lunar Rock RAV4 pulled up front with a full tank.' Make it easy.

### ***Step 5: Trade-In Evaluation (10-15 minutes)***

Always ask about trade-in, even if they haven't mentioned it. 'Are you planning to keep your current vehicle or would you like us to take a look at it?' Get the keys, do a walkaround, check the VIN. Use vAuto or KBB for market-based appraisal. Be transparent about the process.

AI behavior: Always ask about trade within the first 3 messages. Provide a preliminary estimate using market data. 'Based on the 2020 Accord Sport with approximately 52,000 miles, we're typically seeing trade values of \$18,500-\$20,200 depending on condition.'

### ***Step 6: Numbers & Negotiation***

Present the full picture: vehicle price, trade value, down payment, monthly payment at 60 and 72 months. NEVER negotiate monthly payment alone — always show the total deal. Maximum discount authority without manager approval: \$500 on new, \$750 on used. Above that, get the sales manager.

AI behavior: Model payments at 60mo and 72mo. Show the payment WITH and WITHOUT common F&I products (warranty, GAP). Never promise a specific payment until finance has approved the deal. Use ranges: '\$425-\$455/month depending on term and protection options.'

### ***Step 7: F&I; Handoff***

Introduce the finance manager by name: 'Sarah is going to walk you through some options to protect your investment. She's great — she'll explain everything and let you choose what makes sense for you.' NEVER bad-mouth F&I products. NEVER say 'they're going to try to sell you stuff.'

AI behavior: Pre-frame F&I products positively during the sales process. 'Most customers add paint protection and GAP coverage — the monthly difference is usually \$35-\$50 and it can save you thousands.' Plant the seed early.

### ***Step 8: Delivery & Follow-Up***

Walk through every feature of the vehicle. Pair their phone. Set their presets. Take a photo with their new car (with permission). Follow-up call at 24 hours, 7 days, and 30 days. Birthday and anniversary cards. Service reminders.

AI behavior: Send a personalized congratulations text 2 hours after delivery. Schedule follow-ups at 1 day, 7 days, 30 days. Track birthday for annual card. Set service reminder for first oil change.

## Pricing Policies

New vehicles: Internet price is the starting point. Maximum negotiation: \$500 without manager. No deals below invoice minus holdback without GM approval.

Used vehicles: Internet price is firm for the first 60 days. After 60 days, we're flexible. After 90 days, we're motivated. See aging inventory policy.

Trade-ins: Market-based appraisal (vAuto/KBB). We can over-allow up to \$500 to make a deal work. Above that, needs manager approval.

## Aging Inventory Policy

0-30 days: Full price. Normal marketing.

31-60 days: Feature as 'Special Value.' Increase online visibility.

61-90 days: Reduce price 3-5%. Add to targeted campaigns. Sales team gets \$200 bonus spiff.

91+ days: Aggressive pricing. Consider wholesale or auction. \$500 spiff. GM reviews weekly.

AI behavior: Flag all units at 60 and 90 days automatically. Recommend specific price adjustments based on market comps. Draft targeted outreach to matching customer profiles.

## Internet Lead Response Standards

Speed to contact is everything. Our standard:

Web form lead: Respond within 5 minutes. Text first, then email, then phone call.

Phone lead: Answer within 3 rings. If missed, return within 15 minutes.

Chat lead: Respond within 30 seconds during business hours.

After hours: AI responds immediately with a personalized message. Human follow-up first thing next morning.

AI behavior: Respond to all after-hours leads immediately. During business hours, alert the assigned rep and respond if no human response within 5 minutes. Always personalize — reference the specific vehicle they inquired about, provide a direct answer to their question, and suggest a next step (test drive, more info, trade estimate).

## Communication Rules

All customer texts must be professional. No slang, no emojis (unless the customer uses them first). Sign every message with your name.

Required disclaimer on AI messages: 'This message was sent by your AI assistant at Sunshine Toyota Honda.'

Quiet hours: No outbound marketing texts before 9 AM or after 8 PM local time.

Opt-out: Honor immediately. If a customer says 'stop' or 'unsubscribe,' cease all automated communication.