

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.