

# ELEVATING THE CLIENT EXPERIENCE

*Lincoln Brand Champion Checkpoint #2*



LINCOLN **BRAND CHAMPION**



## *Introduction*

Welcome to *Elevating the Client Experience*. The objective of this document is to provide you with a resource of leading practice recommendations for elevating the client experience along with stories documenting efforts that have proven effective in delighting Lincoln clients.

The goal of every Sales and Service Lincoln Brand Champion is to elevate the Lincoln Brand by elevating the Lincoln client experience throughout the store. That can only be accomplished by going “above and beyond” in the levels of personal service we provide to our clients and the level of support we provide to one another as members of the Lincoln team.

There are four sections:

- Exemplary Client Experiences Throughout the Sales and Service Journeys
- Above and Beyond Experiences for Coworkers
- Improving the Store Atmosphere
- Sales Helping Service and Service Helping Sales

There are two types of entries in each section:

- *Leading Practice Recommendations*: These recommendations have been created based on input from Lincoln and competitive brand luxury automotive retailers, focus groups with buyers of luxury products, and your fellow Lincoln Brand Champions.
- *Stories*: These stories are narratives from Brand Champions and other Lincoln store managers and staff about what Lincoln Brand Champions and store personnel have done that has had “above and beyond” impact on not just Lincoln clients, but on their family members, friends and business associates as well.

We urge you to use these recommendations and stories as starting points to inspire your efforts to elevate the client experience in your store. Remember that the expectations of luxury clients are constantly evolving based on their experiences with other brands, other products and other retail transactions. To exceed the expectations of those clients requires you and your team to be constantly sensitive to what will be perceived as going “above and beyond.” You want them to see you and your store as special because you and your team always do everything you can to make them feel special.



# EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



## *Leading Practice Recommendations*

### **NEVER PRE-JUDGE**

Spending time to get to know and understand every client is the key to a sales consultant's success. For example, when two young clients (who weren't taken seriously at a competitor's store) entered the store, the sales consultant took time to get to know them and they purchased an MKZ.

### **ANTICIPATE THE CLIENT'S NEEDS**

There are many opportunities for anticipating and responding to your client's needs. For example, by viewing the day's schedule, the service advisor prepared, cleaned and warmed up the loaner for when the client arrived for service. The client was excited that he cared enough to have things ready and anticipated their needs.

### **SHARE THE KNOWLEDGE**

Believe in the power of passing knowledge on to clients in the form of stories: heritage, crash testing, air bag development, safety, innovation, design, quality and commitment to personal service. Stories that share your passion and excitement about Lincoln are a great way to bring the brand to life in the eyes of your clients.

### **STORIES, STORIES AND MORE STORIES**

Share stories that make Lincoln stand out from the competition. Tell the story that it's more than price and fuel economy. It's in the details. Know the details and share them enthusiastically.





## EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



### AS LONG AS IT TAKES

Take clients through all the technology, no matter how long it takes, and allow them to drive the process, and work around their schedule. By elevating the experience, your client will feel more comfortable and confident in their new Lincoln and more confident in you as a trusted advisor.

### VALUE ALL CLIENTS

Be serious about applying the principles from the Lincoln Academy. Strive to provide every client with a great hospitality experience.



### TUNE IN YOUR CLIENTS

Have an individual or team assigned to pay attention to the radio settings on trade-in vehicles in order to preset radio stations on each client's newly purchased vehicle. This personal service touch helps the client "own" their new Lincoln right from the start. It may be a small touch, but it plays large in communicating your commitment to personalized attention.

### SECOND DELIVERY

Do business on the client's terms—and at the client's location. Product presentations and deliveries at home or at workplaces is becoming the norm. Some stores are doing "second deliveries" or even multiple deliveries to help clients sync phones, link garage doors, set up navigation systems—whatever it takes for the client to become comfortable with the functions and operations of their Lincoln's features.





# EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



## ABCs OF PERSONAL SERVICE

Encourage your Sales and Service Department teams to slow down and listen so they can personalize a “surprise and delight” experience. “Listening” is not just hearing what the client is saying; it is picking up through their body language and tone of voice what is important to them. The most essential connection with a client is established when they know you are really “hearing” them.

## EXCEED EXPECTATIONS

Exceeding expectations is the goal of going above and beyond. One suggestion is to use a welcome board to formally greet clients with appointments to shop for a new or pre-owned vehicle, or to take delivery of their new Lincoln. For deliveries, you can provide clients with an agenda to set their expectations for the delivery. It’s very effective to use an enclosed delivery area to perform active deliveries and review features/benefits. Then, to top it off, you can present the client with a gift or flowers as a token of appreciation for their business. Make the delivery an event. Take photos or capture videos and send them to the client with a follow-up thank-you e-mail or text.

## SPECIAL EVENTS

Give clients tickets to the local auto show or entertainment events you know they would value. This kind of personalized gesture is what it takes to build long-term relationships with valued clients.

## COMMITMENT

Showing clients your level of commitment can be accomplished in the little things, such as working through a lunch break or staying late to pair a client’s cell phone, explaining how a feature functions, or answering questions important to the client.





# EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



## PERSONAL SERVICE

Take the time to know your client, to personalize their experience. This is critical for sales consultants and service advisors, but also very, very important for all members of the store team who have client contact. Luxury clients expect to be remembered and appreciated. For example, service advisors can ask clients about their favorite music and make them a personalized CD that they present upon vehicle pickup after service. Or, they can make sure a bottle of water or the client's beverage of choice is waiting in the vehicle when they pick it up.



## Stories

### TAKING THE TIME

A sales consultant spent more than five hours in the store and two hours at a client's home guiding him through the use of his MKZ Hybrid. The client went from experiencing high anxiety to being relaxed and embracing the new technology.

### OVERCOMING A BAD EXPERIENCE

Objections can be overcome. A service advisor invited a dissatisfied client back to the store for a free maintenance visit to show the store's commitment to correcting an error.

### EXCEPTIONAL CONSIDERATION

Look for things that can be done in the normal course of doing business that will communicate your store's consideration for your clients and your commitment to creating an exceptional experience. For example, one porter makes sure the lot is clean and free of ice and snow. He comes in early at 2:00 a.m.—and even comes in on his days off. Clients (and colleagues) are very happy that they don't have to walk through snow. The porter has gone “above and beyond” to make this happen.



# EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS

## NEIGHBORHOOD PARTY

A Brand Champion makes home deliveries his normal practice. He goes a step beyond by suggesting that his client invite neighbors to come over and see the new Lincoln. He says it turns into an impromptu “Lincoln party” and into conquest sales!

## RESPONDING TO PERSONAL TASTES

A sales consultant includes a gift card to the client’s favorite restaurant when a new vehicle is purchased. Her clients are elated and have repeatedly sent her referral business due to her ability to acknowledge their personal tastes.

## IMPACTING TWO GENERATIONS

An elderly client purchased an MKS. She came in for the delivery and was lost on the technology. The sales consultant went to her home to give a tutorial. She called him later and asked if she could bring her grandson to the store so he could tutor him. Since the weather was very bad, he offered to visit them at her home instead. He explained the vehicle to them both as the grandson drives her to most places.

## FIRST-CLASS SERVICE

A client requested that his new vehicle be waiting at the airport upon his return. The sales consultant asked a teammate to help out due to scheduling difficulties. The teammate took the vehicle to the airport. The plane was delayed for four hours. The teammate waited for the client, who was most impressed and called the store to express his gratitude for such excellent service.



## THE EXTRA MILE

A body shop technician took apart a client’s dashboard to find her wedding ring after it was lost. The client was elated and couldn’t thank him enough.



# EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



## DEDICATION

A sales consultant offered to take an MKX to a client's home during snowy weather to see if it fit their needs. The client bought the MKX instead of a Lexus.

## DRIVING THE DISTANCE

After servicing their vehicle at this store for a year, the clients moved 45 minutes away. However, the distance did not hinder their return to the store due to the exemplary service they received.



## FIXING A FLAT

Our service manager had a Lincoln client who had a flat tire at their home. He went to their house and changed the tire for them. Then he drove them to work, took their car to the store and fixed the flat, and then drove the car back to the client's work.

## COSTCO

One of our staff took a service client to Costco while their vehicle was being serviced. He dropped them off and picked them up when they were finished shopping. When they returned to the store, he helped load their items into their vehicle, which had been serviced and was waiting for them.

## COMPASSIONATE TOUCHES

A service advisor went to a client's home after hearing she had just lost her husband. The advisor helped out by cleaning her home and mowing her lawn.





# EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS

## THE BREAKDOWN

One of our staff had a Lincoln client's car break down at 6:00 p.m. and he had the vehicle towed to the store. He let them use one of the store's cars until their car was repaired. They came back after 1-1/2 years and bought a new MKC, just because of his kindness.

## THE DRIVE

One of our staff delivered a Lincoln MKZ 2-1/2 hours north of our store because the client wasn't able to come in for at least another two weeks to pick up the MKZ. The client was beyond excited.

## HOME VISITS

One of our staff went to a client's house three times to demonstrate SYNC and other features.

## DEDICATION, PERSISTENCE AND PASSION

When a 28-year veteran service technician was presented with an unusual concern, his dedication and persistence to resolve the vehicle issue definitely went above and beyond the call of duty. The vehicle was brought to our Lincoln Service from a local body shop. It presented unusual communication issues after a fender-bender. The client was from out of town and had contacted her selling store to have the vehicle towed home. Our master technician was continually working to resolve the electronic module communication issue, even after the selling store had dispatched a tow. His persistence and desire to resolve this unusual electrical concern led to the vehicle being repaired and the client conveniently receiving her vehicle from our Service Department.

## LOST KEYS

I had a client who had lost the keys to his MKT. I knew that they were probably in the car and he couldn't find them. He wanted to know what he could do about getting another set. I actually went out to his house to check the car. I started the car to make sure they were in the vehicle, then started an extended search, finally finding them caught up on the bottom side of the seat. I retrieved the keys and gave them to the client, who was very thankful they had been found. I explained that I am available to assist him anytime he has a problem.



## EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



### GOING OUT OF MY WAY

We recently sold a Certified Pre-Owned Lincoln MKZ to an individual who lived approximately 75 miles from our store. Our client got home and had problems programming his garage door to his vehicle, and he still had several questions regarding his SYNC system. Instead of walking the client through the step to program his garage door, I personally went to his house and answered his questions and programmed the garage door. Going out of my way and taking time out of my schedule made our client extremely happy. To be honest, our client was shocked that I would personally drive two hours just to program a garage door. Our client said several times it was the best client service he had ever received.

### CLEARLY EXCEPTIONAL SERVICE

A client had a foggy headlight that was not covered in the service plan. The service technician refused to return the vehicle in that state. He removed the assembly and repaired it without charge. The process took approximately two hours.

### HOUSE PARTY WITH AN MKC DELIVERY EVENT

A client came in and purchased a 2015 MKC for his wife that was a dealer trade. When the MKC came into the store, the client was having a party at their home. We drove their new MKC to their house and brought all the paperwork to be signed. I did the delivery orientation with the wife while our sales manager/finance manager went over all the documents with the husband. Everyone from the party took turns checking out the new MKC and they all really loved the delivery. The home delivery turned out to be an MKC delivery event for their guests. Everyone seemed to be really enjoying themselves looking at the new MKC. The wife and husband were very happy and it looked to be the perfect day for them and all the guests at their party. That was a WOW factor!!



# EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



## ABOVE THE CALL OF DUTY

A client traveling through town stopped in because their MKX had a burning smell. One of our service advisors worked quickly to get the vehicle in the shop. Then one of our service technicians quickly diagnosed the smell as a failed PTU. Both staffers stayed after hours to complete the repair and return the vehicle to the client. The client was happy the repair was performed quickly enough that it allowed them to get back on the road and on their vacation getaway.

## FLAT-OUT GREAT SERVICE

A client came in with a flat tire. The Service Department was closed and service personnel were gone for the day. Another associate knew how to repair flat tires and did so with no charge to the client.

## LOST KEYS

We had a client who took a cruise from Galveston, Texas, not long ago. When she arrived back at port, she realized she couldn't find her car keys. She had several friends with her and they called roadside assistance. She said it took several hours for them to come to her location and that by the time they did the local store was closed, so they had to stay in a hotel. She was very unhappy and upset about the service she received from roadside assistance and said she would never own another Lincoln if that were the service she was going to receive. When she came back to town and told us this, we agreed to pay for all of her expenses. We picked up the tab on the hotel, food and any other out-of-pocket expenses she had incurred. After being reimbursed for her expenses, she felt much better about having a Lincoln—and knowing that we, as a Lincoln store, would always be there to assist, even if she were miles away. Of course, she said that she would buy another Navigator in the near future.





## EXEMPLARY CLIENT EXPERIENCES THROUGHOUT THE SALES AND SERVICE JOURNEYS



### FOOD FOR THOUGHT

A sales consultant sold an MKZ to a couple who asked to take delivery at a restaurant where they were dining with friends. The sales consultant drove 40 minutes to the restaurant to meet the couple. He gave them a thorough walkaround, educating not only his clients on the MKZ, but also their friends, who had recently purchased a Mercedes-Benz. Their friends were impressed by the Lincoln vehicle and the sales consultant's level of commitment. Two days later they walked in and bought an MKZ.

### YOU ARE ALWAYS ON MY MIND

While coming in for service, a client asked a few questions regarding her SYNC system. I followed her to her vehicle so I could demonstrate the answers to her questions. When she started her vehicle the song "You Are Always on My Mind" by Willie Nelson was playing. She was in tears and told me prior to her husband passing away he would always play her this song and continuously tell her she was always on his mind. Once we finished the tutorial of the SYNC system, I had my service manager go to the store and get a dozen yellow roses (her favorite color) and a card. In the card I wrote, "Here at Jacky Jones Lincoln, you are always on our mind." I placed the flowers and card in her front passenger seat, where it would be seen by her once she reentered her vehicle after service was complete. I watched her get into her Lincoln and see the flowers and read the card. Needless to say, she was overjoyed!







# ABOVE AND BEYOND EXPERIENCES FOR COWORKERS



## *Leading Practice Recommendations*

### **CREATE A TOTAL STORE EXPERIENCE**

Share your commitment and passion. Conduct an “all-store” meeting, including technicians, to share the emotion and passion generated from the Immersion. Provide examples from the Immersion to instill confidence in the brand and the long-term commitment to Lincoln by the Ford family. Show colleagues how to use stories about safety, design, competitive driving, heritage and the museum in their walkaround presentations.

### **FACILITATE TEST DRIVES FOR COLLEAGUES**

Arrange for colleagues to test-drive competitive products at competitive dealerships. Have them take notes and debrief around how that knowledge can be used to more effectively present and sell the Lincoln lineup.

### **LEVERAGE SALES AND SERVICE DEPARTMENT MEETINGS**

Have a regular meeting (or part of a Sales or Service Department meeting) to talk about how to elevate the client experience. Share stories and client successes. Share insights from the Lincoln Brand Champion website and other sources.

### **CONDUCT ONE-ON-ONES**

Conduct one-on-one meetings with peers to share Lincoln’s commitment by sharing insights, stories and details on current and planned programs. Make sure everyone understands the Lincoln commitment and brand strategy based on Design, Quality and Personal Service. Make sure everyone understands and is committed to elevating the client experience.





# ABOVE AND BEYOND EXPERIENCES FOR COWORKERS



## RECOGNIZE PERSONAL SERVICE

Use the Peer-to-Peer Kit to focus attention on the Lincoln commitment to personal service. Give recognition at staff and Sales and Service Department meetings, telling the story of what they did to go above and beyond. Have the store provide gift cards or awards beyond the Peer-to-Peer program. Include public recognition by featuring recognized employees on the store website, for example.

## Stories



## SELFLESSNESS

A sales consultant helped to deliver four vehicles when his coworker's father passed away. On top of that, he did not accept any commission for those deliveries.

*You are urged to promote attitudes and behaviors that result in coworkers going above and beyond for each other in your store. The “one store, one team, one client experience” cannot be achieved by individuals working independently. It takes a smoothly running collaboration among team members to always create exceptional experiences for our clients at every point of contact.*

*Make your stories happen and post them to the Lincoln Brand Champion Dashboard. Share the knowledge. Share the enthusiasm. Share the accomplishments.*

**YOUR  
STORIES HERE**



# IMPROVING THE STORE ATMOSPHERE



## *Leading Practice Recommendations*

### **BOOST MORALE**

Boost morale during Sales and Service Department meetings by reminding everyone at the store that each one of them is a champion—and that Lincoln is investing in the brand and in us.

### **CELEBRATE—INCLUDE EVERYONE**

Have sales and service managers celebrate a success story once a week. The story goes out via e-mail to all associates.

### **SHARE THE ENTHUSIASM—IT'S CONTAGIOUS**

Enthusiasm—share yours—it's contagious! Show and lead by example. When a client gives public praise, it is contagious amongst the staff.

### **SPREAD THE WORD**

Be passionate about Lincoln. Use social media to talk up the brand. Engage in Lincoln owner's clubs, inviting them to host events at your store.

### **SHARE IN BITE-SIZED PIECES**

Share “Lincoln Info Snacks” or “Lincoln Tidbits” in Sales and Service Department meetings, on bulletin boards, or in your store's monthly newsletter. Get the information from the Immersion, Lincoln chat room, Frontline or the Brand Champion Dashboard.





# IMPROVING THE STORE ATMOSPHERE



## HOLD WALKAROUND FRIDAYS

Hold “Walkaround Fridays” to share stories (successes and accomplishments) and product nuances (how they have been effective with Lincoln clients).

## IMMERSE THE TEAM

Brand Champions have reinforced the power of the Immersion and extended its impact by sharing the knowledge and enthusiasm with their teams. Many have carried it forward and shared it through customized presentations to Sales and Service Department teams as well as clients in their store.

## LEAD BY EXAMPLE

Brand Champions say that leading by example is a great way to get Sales and Service Department staff to share the value of the brand. Educate and motivate them by showing, doing, coaching and watching.

## *Stories*

### FREE WASH

The porter consistently washes clients’ cars for free—even if they are not in for service. As the porter, he always stops what he is doing and greets clients with a smile.







# IMPROVING THE STORE ATMOSPHERE



*You are urged to promote attitudes and behaviors that improve the atmosphere in your store. The specifics of how you accomplish this will vary based on the size, culture and traditions of your organization. However, there are some approaches that will serve to enhance any store atmosphere.*

*Those include creating an atmosphere that is as warm and welcoming for all store associates as it is for your clients. Tangible demonstrations of mutual respect and consideration, such as making eye contact and saying hello in the morning, can be a simple but effective first step. Periodic inter-departmental gatherings or lunches can raise the levels of mutual awareness and rapport. That mutual respect can be extended to awareness and consideration for the physical facility and how it represents your team and the Lincoln Brand (e.g., noticing litter and disposing of it, noticing repair or maintenance needs and reporting them to the appropriate person). Everyone wants to work at a store in which they can take pride. Pride in the people. Pride in the facility. Pride in the Lincoln products and services.*

*Maintaining a positive, productive store atmosphere is critical to how you will be perceived by your clients. If your store “feels good,” your clients are much more likely to feel good about being there and doing business there.*

*Make your stories happen and post them to the Lincoln Brand Champion Dashboard. Share the knowledge. Share the enthusiasm. Share the accomplishments.*

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# SALES HELPING SERVICE AND SERVICE HELPING SALES



## *Leading Practice Recommendations*

### **FOSTER EFFECTIVE COLLABORATION**

Both the Sales and Service Department teams can often accomplish more and provide enhanced client experiences when they help each other. Identify ways the two teams can support each other on specific tasks or during crunch periods on the service drive in the morning or in the showroom on the weekend. Don't expect team members to "make up" these points of collaboration on their own. This has to be thought out, discussed and implemented with guidance and coaching.

### **FOSTER MUTUAL RESPECT**

Team members helping each other across departmental boundaries has to be motivated by an emotional connection to the effort, not merely implemented as a policy or process. This requires mutual respect between departments and the individuals in those departments. Foster this mutual respect by scheduling inter-departmental meetings and/or lunches on a regular basis. Include short presentations of department operations and issues so each team member understands what the other does and how they do it. Do not overlook sharing success stories. This is a great way to create mutual respect. Also, and just as important, provide opportunities for department team members to get to know each other, one on one, by holding informal gatherings. Consider going off site to create an event that is more personal and less business as usual.

### **SHARING TECHNOLOGY**

Demonstrate how to most effectively present Lincoln technology during a product presentation without overwhelming the client.





# SALES HELPING SERVICE AND SERVICE HELPING SALES



## *Stories*

### TEAMWORK

A sales consultant and a service technician worked together to clean a client's vehicle. In this store, it is commonplace for store associates to help clean and multitask. Sometimes the store can be chaotic, with many clients coming in all at once, but associates never say, "It's not my job." They all help to keep things running in a smooth fashion.

### CLEANING UP IN A PINCH

A sales consultant hand-washed a vehicle for delivery because the Make Ready Department was gone for the day.

### COFFEE FOR ALL

One sales consultant went on his daily coffee run and brought back a coffee for a client who was waiting for his vehicle to be serviced. This client was very grateful and surprised, as it wasn't even his sales consultant who went out of his way to get the coffee.

### TRUST

Upon hearing that a client with a 2012 MKZ did not like the new 2013 MKZ, the service advisor spent the time to go over the features and benefits of the new MKZ. The client purchased the new MKZ as he trusted the advisor's judgment and knowledge.





# SALES HELPING SERVICE AND SERVICE HELPING SALES



## NO DIRECTIONS NEEDED

A parts advisor was asked where the Sales Department was. Rather than telling the elderly couple how to get there, the advisor walked them down to sales himself.



*You are urged to promote mutual respect and collaboration between your Sales and Service Departments so there is a commitment to helping each other across departmental boundaries.*

*This is where Sales Brand Champions and Service Brand Champions have an opportunity to really multiply their impact by working together to accomplish this objective.*

*This is a major opportunity to make sure your store “feels good” to your clients whenever and wherever they come into contact with you—Sales or Service.*

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LINCOLN BRAND CHAMPION