

## **INSTRUCTIONS** *(Not part of Team Meeting Slides)*

### **Preparing for the Team Meeting**

- First, meet with your Dealership management and obtain their permission to hold a meeting to discuss what you've learned from this Check Point assignment. As a reminder, this meeting is part of the assignment, and you must share what you've learned before you can take your TEST in STARS
- The Sales and Service Brand Champions should host this meeting together, if possible. You may host multiple/separate meetings if your Dealership schedule cannot accommodate one team meeting. The meeting should be at a time that allows the greatest number of your Sales and Service associates to participate
- The meeting should only take 15 minutes, but could take longer if you choose to provide more information. There is no limit to the length of the meeting

### **Customizing the Presentation**

- You will need to customize a few of the following slides based on the outcome of your discussions with your Brand Champion counterpart

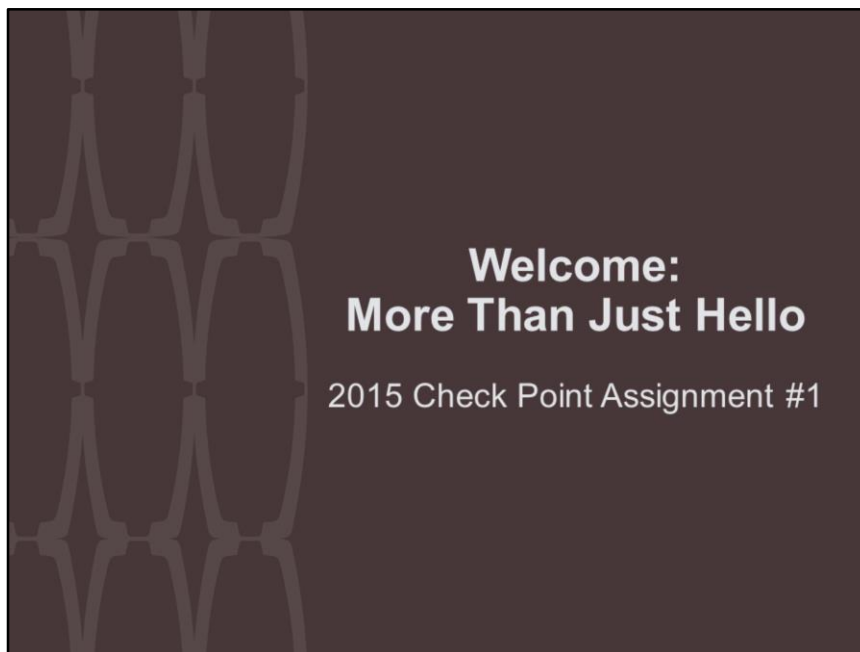
**INSTRUCTIONS** *(Not part of Team Meeting Slides)*

- This set of slides is provided for you to use as best suits the needs of your Dealership. You can delete slides or rearrange slides as you see fit
- You will need to omit slides, depending on which tool you chose. If you chose the *Peer-to-Peer Kit*, please omit *The Restaurant Experience* slides. If you chose *The Restaurant Experience* tool, please omit the *Peer-to-Peer Kit* slides

**Conducting the Team Meeting**

- You and your partner will work together to make the presentation. Decide in advance who will present each section (alternating slides may work best). Also, decide whether you will print these slides and have everyone follow along, or if you will display the slides on a monitor or projector (if your Dealership has this technology)
- You want this to be an informative, engaging meeting. To accomplish that, we strongly suggest you prepare and rehearse with your Brand Champion counterpart in advance of the meeting

**THE PRESENTATION BEGINS WITH THE NEXT SLIDE**



- **Intro Slide (less than 1 minute)**
- **SPEAKERS (Present this slide together):**
- **INTRODUCE YOURSELVES, THEN SAY:**
- This is the first of three “Check Point” meetings we will be holding this year to focus on key elements of the Lincoln Luxury Client Experience.
- Today’s focus is on the “Welcome” ... how we make our clients feel welcome, respected and valued from the moment they walk into our store to the moment they depart.

## Our Purpose Today

- This meeting is part of our effort to make our clients feel welcomed, in every part of our store
- It's more than just "Hello" - It's making our clients feel like they are part of our family, that they belong here, and that we care about them
  - Respected
  - Appreciated
  - Valued
  - Cared For

- **Our Purpose (2 minutes)**

- **SAY:**

- Our meeting today will last approximately **15 MINUTES**. (Or whatever length of time you are dedicating to this meeting.)
- State the purpose in the first bullet.
- Explain what we mean by *feeling welcomed*. Work with the copy on the slide and add the "feelings" you want to add to the list to expand the conversation.
  - Respected – for their thoughts, preferences, wants and needs
  - Appreciated – as individuals, not just for their business
  - Valued – as a potential long-term relationship
  - Cared For – anticipating their needs and responding to them

## How Are We Doing Today?

- We are doing a great job already. But could we do better?
- How could we improve the client welcome on the Sales side?
- How could we improve the client welcome on the Service side?
- As a team, let's discuss this together. In the next slide we will look at Sales. After that, we will look at Service.

- **How Are We Doing Today? (2 minutes)**
- **READ FROM SLIDE**
- **READ FIRST QUESTION – SOLICIT RESPONSES AND DISCUSS BRIEFLY**
- **MOVE TO SECOND QUESTION – SOLICIT RESPONSES AND DISCUSS BRIEFLY**
- **NOTE: This is a set-up to prepare for the more detailed discussion based on the next two slides.**

## Our Store

- How we extend the welcome feeling to our clients
- In **SALES**, while they are:
  - Browsing
  - Selecting a vehicle
  - Negotiating the contract
  - Going through finance
  - Experiencing Orientation and Delivery

- **Truths About Our Store (3 minutes)**

- **SALES BRAND CHAMPION:**

- **SAY:**

- Now that we know what “welcome” feels like, let’s look at our store and how we extend the welcome feeling in Sales.

- **GUIDE DISCUSSION FROM SLIDE - HOW THE WELCOME FEELING CAN BE EXTENDED THROUGH THE LISTED PHASES OF THE SALES PROCESS**

- **REFER TO YOUR NOTES FROM THE SELF-STUDY MODULE TO FEED THIS DISCUSSION**

- **CAPTURE GOO IDEAS AND OPPORTUNITIES FOR IMPROVEMENT**

## Our Store

- How we extend the welcome feeling to our clients
- In **SERVICE**, while they are:
  - Making an appointment
  - Reviewing the work to be done
  - Waiting for their loaner vehicle
  - Interacting on an update phone call
  - Receiving their vehicle after service is completed
- Have we displayed our framed photos?
- Do we talk about Spotify?

- **Truths About Our Store (3 minutes)**

- **SERVICE BRAND CHAMPION:**

- **SAY:**

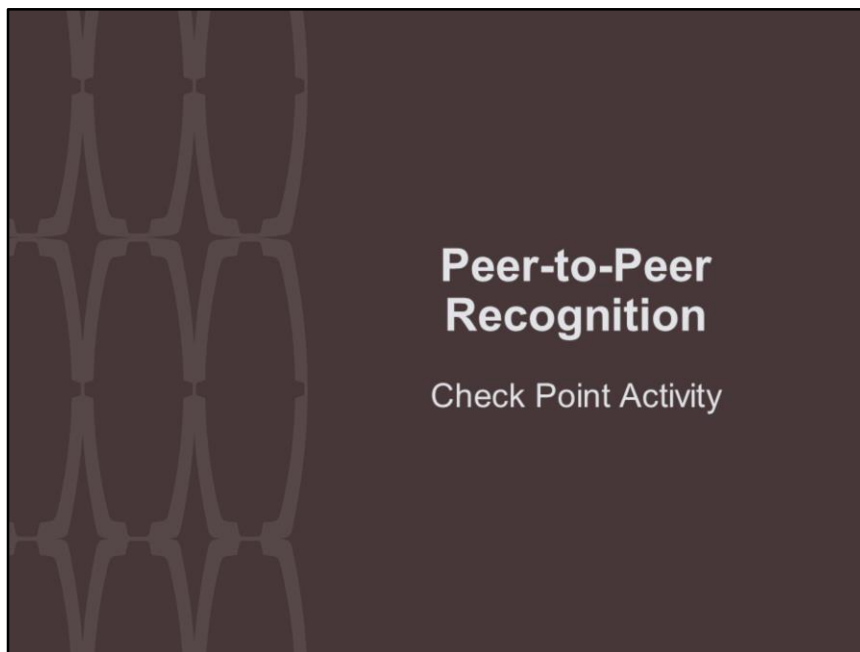
- Now let's look at how we extend the welcome feeling in Service.

- **GUIDE DISCUSSION FROM SLIDE - HOW THE WELCOME FEELING CAN BE EXTENDED THROUGH THE LISTED PHASES OF THE SERVICE PROCESS**

- **REFER TO YOUR NOTES FROM THE SELF-STUDY MODULE TO FEED THIS DISCUSSION**

- **CAPTURE GOO IDEAS AND OPPORTUNITIES FOR IMPROVEMENT**

- **TRANSITION TO PEER-TO-PEER OR DINING EXPERIENCE SECTION**



- **USE THIS SECTION IF YOU SELECTED THE PEER-TO-PEER RECOGNITION KIT AS YOUR OPTION FOR THIS QUARTER**
- **Peer-to-Peer Recognition (less than 1 minute)**
- **SAY:**
- Part of this Check Point Assignment was to look for ways to make our clients feel more welcomed, which we did through the focus of our Peer-to-Peer Recognition.
- **Note: Describe Peer-to-Peer Recognition process if your associates are not familiar with it.**



## **The Peer-to-Peer Kit**

- Our “Welcome” Stories
  - **SALES**
    - Share a recognition story from Sales
  - **SERVICE**
    - Share a recognition story from Service

- **Truths About Our Store (2 minutes)**
- **SALES BRAND CHAMPION:**
- **Note: Introduce the Story Card process if any of your associates are not familiar with it.**
- **DO:**
- **Read one or more stories from the Story Cards you received. Point out why they are good examples of the kinds of behaviors that create exceptional client experiences.**
- **SERVICE BRAND CHAMPION:**
- **DO:**
- **Read one or more stories from the Story Cards you received. Point out why they are good examples of the kinds of behaviors that create exceptional client experiences.**
- **TRANSITION TO CLOSING SLIDE**



- **USE THIS SECTION IF YOU SELECTED THE RESTAURANT VISIT AS YOUR OPTION FOR THIS QUARTER**
- **The Restaurant Visit Activity (less than 1 minute)**
- **SAY:**
- Part of this Check Point Assignment was to look for ways to make our clients feel more welcomed, which we did through an activity that took us to a local restaurant to document how the experience made us feel ... and how those feelings relate to the client experience we create here in our store.

## The Restaurant Visit

- We focused on such things as:
  - The experience of **parking**
  - The **greeting** we received
  - How we felt about the **sights** and **sounds**
  - How our **server** and other staff treated us
  - How easy it was to **order** and **pay**
  - How **welcomed** and **appreciated** we felt
- What did we learn?
- How can we apply what we learned in our store?

- **Truths About Our Store (2 minutes)**

- **SAY:**

- Here are the things we focused on:

- **REVIEW BULLETS ON SLIDE**

- **SAY:**

- So, what did we learn from our experience in each of these areas?

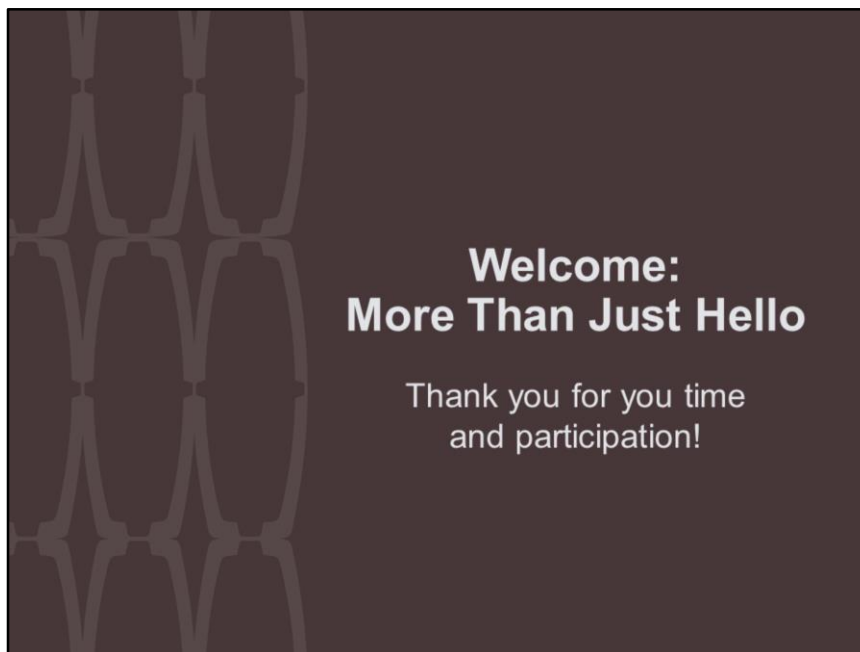
- **REVIEW MOST IMPORTANT POINTS OF WHAT YOU LEARNED**

- **SAY:**

- Now, the payoff. How can we apply what we learned in our store?

- **REVIEW HOW WHAT YOU LEARNED CAN HELP YOUR TEAM CREATE A WELCOMING ENVIRONMENT EVERYWHERE IN YOUR STORE TO DELIVER CONSISTENTLY EXCEPTIONAL CLIENT EXPERIENCES.**

- **TRANSITION TO CLOSING**



- **Closing (1 minute)**
- **SPEAKERS:**
- **SHARE YOUR PERSONAL INTERPRETATION OF WHAT “WELCOME” MEANS TO YOU ... WHAT YOU WILL DO TO MAKE CLIENTS FEEL WELCOME AT EVERY TOUCH-POINT OF THEIR VISIT ... THE BENEFITS TO BE GAINED FOR YOU AND YOUR RELATIONSHIPS WITH YOUR CLIENTS ... FOR YOUR STORE ... AND FOR THE LINCOLN BRAND.**
- **URGE YOUR ASSOCIATES TO BE CONSTANTLY AWARE OF WHAT THEY CAN DO IN THEIR POSITIONS TO MAKE CLIENTS VISITING YOUR STORE FEEL WELCOME.**
- **THANK YOUR ASSOCIATES FOR THEIR TIME AND PARTICIPATION!**