

## Financial Services Class Agenda

### Monday: (9:00am-5:00pm)

- Introductions
- Objectives and Agenda
- Performance and Evaluation
- Professional Standards
- Problems to Solve.
- Code of Conduct
- Financial Services Product Sales Process
- Baseline Performance
- Model (before explanation)
  - Phase 1 – Interview
  - Phase 2 – SCF COF Presentation
- Explanation of the Menu Presentation
  - Phase 1 – Interview
  - Phase 2 – SCF COF Presentation
- PEF Introduction
- Model with PEF (after explanation)
- Homework: Prepare to perform (refer to Tuesday Competence Performance)

### Tuesday: (9:00am-5:00pm)

- Competence Performance Role Play (video tape: interview, SCF COF presentation)
- Justifying Value (Need Awareness, Need Satisfaction, Trail Close, Close)
- Mechanical Repair Agreement Objections (Lack of value, lack of trust, affordability, hesitation, valid)
- Service Contract Value Justifications
- Model with Performance Evaluation (after explanation)
- Homework: Prepare to perform (refer to Wednesday Competence Performance)



## resource automotive

### **Wednesday: (9:00am-5:00pm)**

- Competence Performance Role Play (video tape: interview, SCF COF and SC objections)
- Customer Reaction to COF Presentation
  - Customer Resists at the Beginning of the Presentation
  - Customer Buys Preferred
  - Customer Buys less than Preferred
  - Customer Buys Nothing
- Resistance at the Beginning
- Upgrading the Option
- Resistance to all Programs
- Other Product Value Justifications
- Homework: Prepare to perform (refer to Thursday Competence Performance)

### **Thursday: (9:00am-5:00pm)**

- Competence Performance Role Play (video tape: SCF COF presentation and objections)
- Bank/ Credit Union/Cash Conversions
  - Line of Credit
  - Right of Set-Off
  - Rate Defense
  - Convenience
- Best Practices for Selling Paper – Includes:
  - Credit Worthiness and the 3 “Cs”
  - Structuring the Deal
  - Negotiating Approvals

### **Friday: (9:00am until approx. 1:00 or 1:30pm)**

- Live Sell (SCF COF Presentation in Context)
- Best Practices – What to do When You Get Back to the Store
  - Save-a-Deal
  - Sales Meetings – How to Conduct and Key Topics
  - Building Credibility
- SCF COF Installation and Data Entry
- Student Evaluation of Training Survey
- Module Conclusion