01 / LISTEN BEFORE RECOMMENDING

Customer discovery checklist

Use these prompts as a conversation guide. Ask one useful question, listen, and let the customer set the pace.

Date: _____ Practice scenario / reference: _____

Understand the customer's priorities

- [ ] What would you like your next vehicle to do better than your current one?
- [ ] How will you use the vehicle on a typical day?
- [ ] Who or what needs to fit comfortably?
- [ ] Which features are essential, and which would simply be nice to have?
- [ ] Are you comparing particular vehicles or working toward a time frame?
- [ ] What would make today's visit useful for you?

Confirm before selecting a vehicle

Top three priorities

Must-have requirement or concern to verify

My summary: "It sounds like the most important things are..."

Customer-approved next step

Practice tip: Repeat the priorities in your own words and ask, "Did I get that right?" Keep customer contact details in your dealership's approved system.

02 / CONNECT FEATURES TO NEEDS

Vehicle walkaround planner

Plan a focused presentation around the customer's priorities. Verify vehicle details before making claims.

Vehicle / trim: _____ Date: _____

Build three useful demonstrations

Customer priority	Feature to verify	Show the benefit	Ask for feedback

Example: Easier rear-seat access / door opening and seat configuration / invite the customer to try getting in and out / "How does that compare with what you use now?"

Before moving to the next step

- ☐ I verified the features, availability, and any specifications I discussed.
- ☐ I invited the customer to try what mattered most and listened to the feedback.
- ☐ I asked permission before suggesting a demonstration drive or another vehicle.

Practice tip: A useful demonstration answers a specific customer need. Avoid a long feature list or promises you have not verified.

03 / BUILD CONSISTENT HABITS

Daily activity tracker

Set realistic practice goals with your manager. Track useful actions and learning, then choose one improvement for tomorrow.

Date: _____ Today's focus: _____

Plan and record your activity

Activity	Goal	Actual	Done
Customer conversations			☐
Needs assessments completed			☐
Vehicle demonstrations			☐
Agreed follow-ups completed			☐
Appointments confirmed with the customer			☐
Product knowledge practice (minutes)			☐
Role-play / coaching practice (minutes)			☐

What worked well today?

What will I practice differently tomorrow?

Follow-up habit: Agree on a useful next step and the customer's preferred contact method. Respect requests for space or no further contact. Record customer details only in your approved CRM.