



The Art and Science Of Consultative Selling



Welcome

Day One

4. "I don't know why corporate wants you to do that either."

6. "Huh....this is the first time I'm hearing this"

9. "How's business?"

1. "Is the Dealer Principal in today?"

5. "Please buy this assortment so I get my bonus."

10. "You need to sell more!!"

2. "I need you to take these three bikes."

3. "Hi! Nice to see you! Here's how to fix your sales problem."

7. "What's next with HDCX? Who knows, I'm sure it'll be re-named something soon."

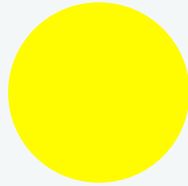
8. "Could you just log in? They are tracking participation"



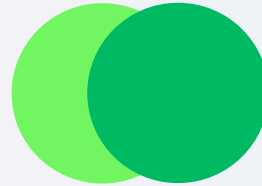
BROTHERHOOD BY COLOR

Screen

Yellow



Screen



Fluorescent/
Dark green

Fluorescent
pink



Fluorescent
orange



Blue/teal



Purple/
magenta



INTRODUCTION

In your groups ...

1. “My name, role, and territory ...”
2. “One thing I love about my role ...”
3. “The Consulting Pitfall I struggle with most often ...”
4. “The Consulting Pitfall I struggled with most recently (if different from #3) ...”

1. “Is the Dealer Principal in today?”

2. “I need you to take these three bikes.”

3. “Hi! Nice to see you! Here’s how to fix your sales problem.”

4. “I don’t know why corporate wants you to do that either.”

5. “Please buy this assortment so I get my bonus.”

6. “Huh....this is the first time I’m hearing this”

7. “What’s next with HDCX? Who knows, I’m sure it’ll be re-named something soon.”

8. “Could you just log in? They are tracking participation.”

9. “How’s business?”

10. “You need to sell more!!”

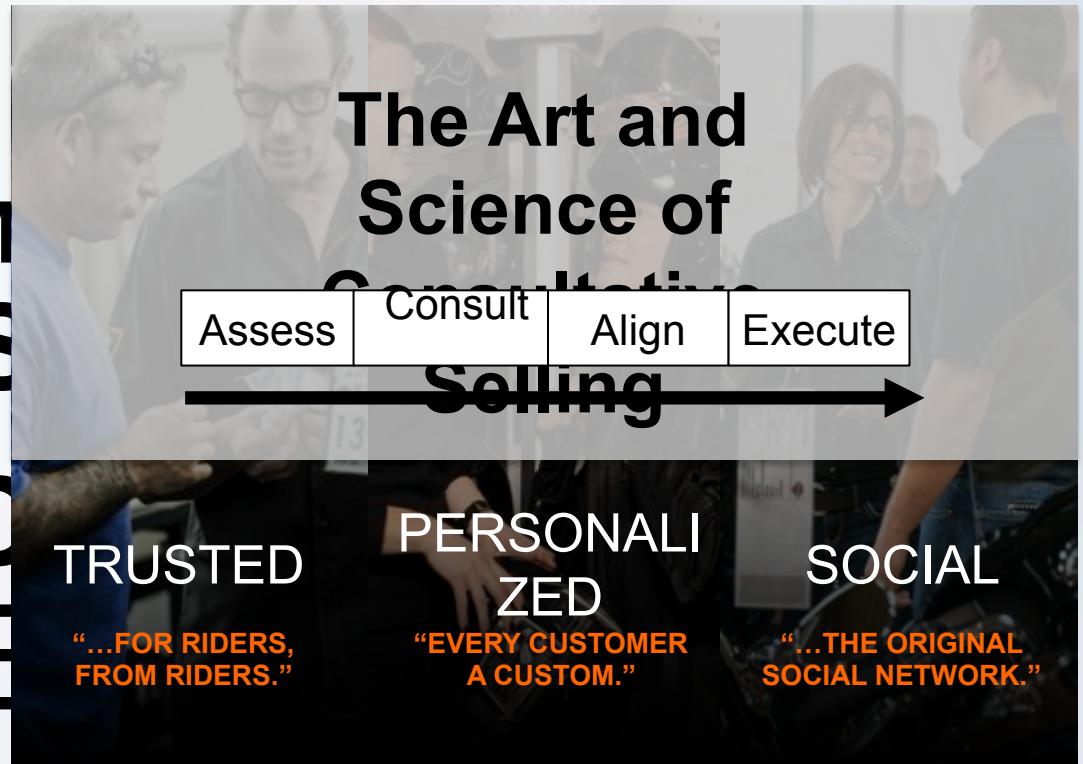
THE BIG PICTURE



KICK-ASS CUSTOMER
EXPERIENCES

...DELIVERED
EVERYTIME
for

EVERYONE



You are role models for dealers.



Varied planning

Eclectic group

Tactical and
initiative-driven

Credibility in
specific things

Playing a role



Universal approach

Unified group

Thinking
strategically

Credibility as a
business advisor

Making a
difference and
changing the game

WHAT YOU'LL BE ABLE TO DO

p. 4

1. Find **opportunities**
2. Navigate **conversations**
3. Create **accountability**
4. Achieve **results**



Assess

Consult

Align

Execute



ASSESS CONSUL ALIGN EXECUTE

Grow the Business

Handout

Topics

Tools

Behaviors

Identify opportunities in your district

- Financial acumen review
- Dealer health assessment and balanced scorecard
- Prioritizing dealers
- How trusted are you?

Lead effective conversations, consistently

- Preparing for dealer visits
- Influence w/o authority
- Listening to build trust and solve problems
- Your Trust Temperament™

Generate consensus on opportunities and action plans

- Navigating conversations
- Envisioning what's possible
- Developing a collaborative plan

Create mutual accountability

- Commitment and follow-through
- Your detailed action plan

HOW WE'LL GET THERE

Day One

YOU ARE HERE

Assess

- Financial acumen review
- Dealer health and balanced scorecard
- Prioritizing dealers
- How trusted are you?

Consult

- Preparing for dealer visits

Day Two

Consult (con't)

- Influence without authority
- Listening to build trust and solve problems
- Your Trust Temperament™

Align

- Navigating conversations
- Envisioning what's possible
- Developing a collaborative plan

Execute

- Commitment and follow-through
- Your detailed action plan

Follow Up

Execute (con't)

- Commitment and follow-through

REQUESTS







REQUESTS



Your District Overview

In pairs:

- Share the District Overview you completed as pre-work
- Identify for your partner:
 - One insight you gained
 - One challenge you had

p. 5

PERSONALIZE IT



Financial Acumen Review

Assess

Consult

Align

Execute



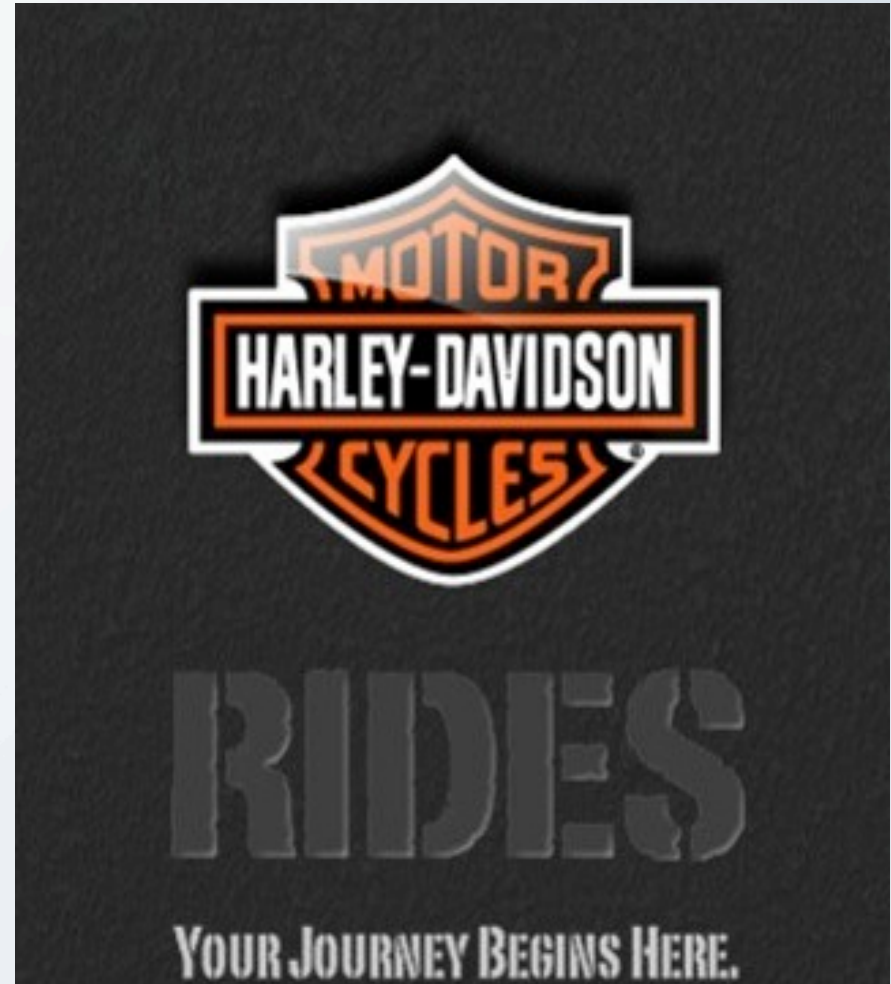
BOARD GAME AGENDA

Setting the stage

- What to expect?

Scenarios

- Set up the board
- Sell a bike
- Purchase a Jumpstart



Income Statement / Profit & Loss

| | |
|--|-------|
| + Sales/Turnover | _____ |
| – COGS (Cost of Goods Sold) | _____ |
| – Depreciation | _____ |
| – Operating Expenses (Selling, Employment, Semi-Fixed, Fixed) | _____ |
| – Interest and Taxes | _____ |
| = Net Income/Profit | _____ |

Process: Read
Scenario and move
“Accounting Dollars”
accordingly...



Coins = €1,000
“Accounting
Dollars” each

Balance Sheet

Assets

Short-Term/ Current Assets

Cash _____

Acct. Receivable/
Trade Debtors _____

Stock/Inventory _____

Fixed and Non-Current Assets

(Land, Building, _____
Furniture, Equipment)

– Accumulated
Depreciation _____

Liabilities

Accounts Payable/
Trade Creditors _____

Floorplan _____

Short-Term Loans _____

Customer Deposits/
Other Current _____

Long-Term
Liabilities _____

Equity

Ordinary Shares _____

Retained Earnings _____

CHALLENGE 1: SET UP THE BOARD

p. 6

Assume that you walk into a dealership and you see:

- €2,000 in Cash.
- €10,000 in Ordinary Shares, €6,000 in Retained Earnings.
- 2 Sportster 1200 Custom in Stock that cost €7,000 each.

Challenge

- What changes on the board?



Income Statement / Profit & Loss

| | |
|--|-------|
| + Sales/Turnover | _____ |
| – COGS (Cost of Goods Sold) | _____ |
| – Depreciation | _____ |
| – Operating Expenses (Selling, Employment, Semi-Fixed, Fixed) | _____ |
| – Interest and Taxes | _____ |
| = Net Income/Profit | _____ |

Current Condition: €2,000 in Cash.
 €10,000 in Ordinary Shares, and
 €6,000 in Retained Earnings. 2
 Sportsters in Inventory that cost €7,000
 each.

Balance Sheet

Assets

Short-Term/ Current Assets

Cash

€2K

Acct. Receivable/
Trade Debtors

€7K

€7K

Stock/Inventory

Fixed and Non-Current Assets

(Land, Building,
Furniture, Equipment)

– Accumulated
Depreciation

€16,000

Liabilities

Accounts Payable/
Trade Creditors

Floorplan

Short-Term Loans

Customer Deposits/
Other Current

Long-Term
Liabilities

Equity

Ordinary Shares

€5K

€5K

Retained Earnings

€5K

€1K

€16,000

CHALLENGE 2: SELL A SPORTSTER 1200 CUSTOM

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Move Chips on Board:

- Sell 1 Sportster for €10,000 in Cash.
(Reminder: cost was €7,000)
- Pay Operating Expenses of €1,000 in Cash. (e.g., Selling, Employment, Semi-Fixed, Fixed)
- Pay Taxes of €1,000 in Cash.
- How does the board look at the end of the year?



Use chips off the board as needed.

Income Statement / Profit & Loss

| | |
|--|--|
| + Sales/Turnover | _____ |
| – COGS (Cost of Goods Sold) | _____ |
| – Depreciation | _____ |
| – Operating Expenses (Selling, Employment, Semi-Fixed, Fixed) | _____ |
| – Interest and Taxes | _____ |
| = Net Income/Profit | _____  |

Current Condition: Sell 1 motorcycle for €10,000 in Cash (COGS was €7,000). Pay Operating Expenses of €1,000 in Cash. Pay Taxes of €1,000 in Cash. How does the board look at the end of the year?

Balance Sheet

Assets

Short-Term/ Current Assets

Cash

€2K

Acct. Receivable/
Trade Debtors

€7K

€7K

Stock/Inventory

Fixed and Non-Current Assets

(Land, Building,
Furniture, Equipment)

– Accumulated
Depreciation

€17,000

Liabilities

Accounts Payable/
Trade Creditors

Floorplan

Short-Term Loans

Customer Deposits/
Other Current

Long-Term
Liabilities

Equity

Ordinary Shares

€5K

€5K

Retained Earnings

€5K

€1K

€17,000

CHALLENGE 3: BUY A JUMPSTART & USED TRUCK

p. 10


It's a new year. Clear the Income Statement!

Move Chips on Board :

- Dealer buys a Jumpstart and a used truck for a total of €20,000.
- Partially financed with a €10,000 long-term loan (0% interest). The rest will come out of cash.
- Depreciates these assets using straight-line over 10-years.
- How does the board look at the end of the year?



Income Statement / Profit & Loss

| | |
|--|--|
| + Sales/Turnover | _____ |
| – COGS (Cost of Goods Sold) | _____ |
| – Depreciation | _____ |
| – Operating Expenses (Selling, Employment, Semi-Fixed, Fixed) | _____ |
| – Interest and Taxes | _____ |
| = Net Income/Profit | _____  |

Buy Jumpstart & Truck: Borrow €10,000 on Jan. 1. Buy a Jumpstart & Truck for €20,000 Cash on Jan. 1, depreciated straight-line over 10-years. How do the board look at the end of the first year?

Balance Sheet

Assets

Short-Term/ Current Asset

Cash

Acct. Receivable/
Trade Debtors

Stock/Inventory

Fixed and Non-Current Assets

(Land, Building, Furniture, Equipment)

– Accumulated
Depreciation

€25,000

Liabilities

Accounts Payable/
Trade Creditors

Floorplan

Short-Term Loans

Customer Deposits/
Other Current

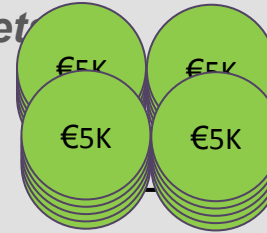
Long-Term
Liabilities

Equity

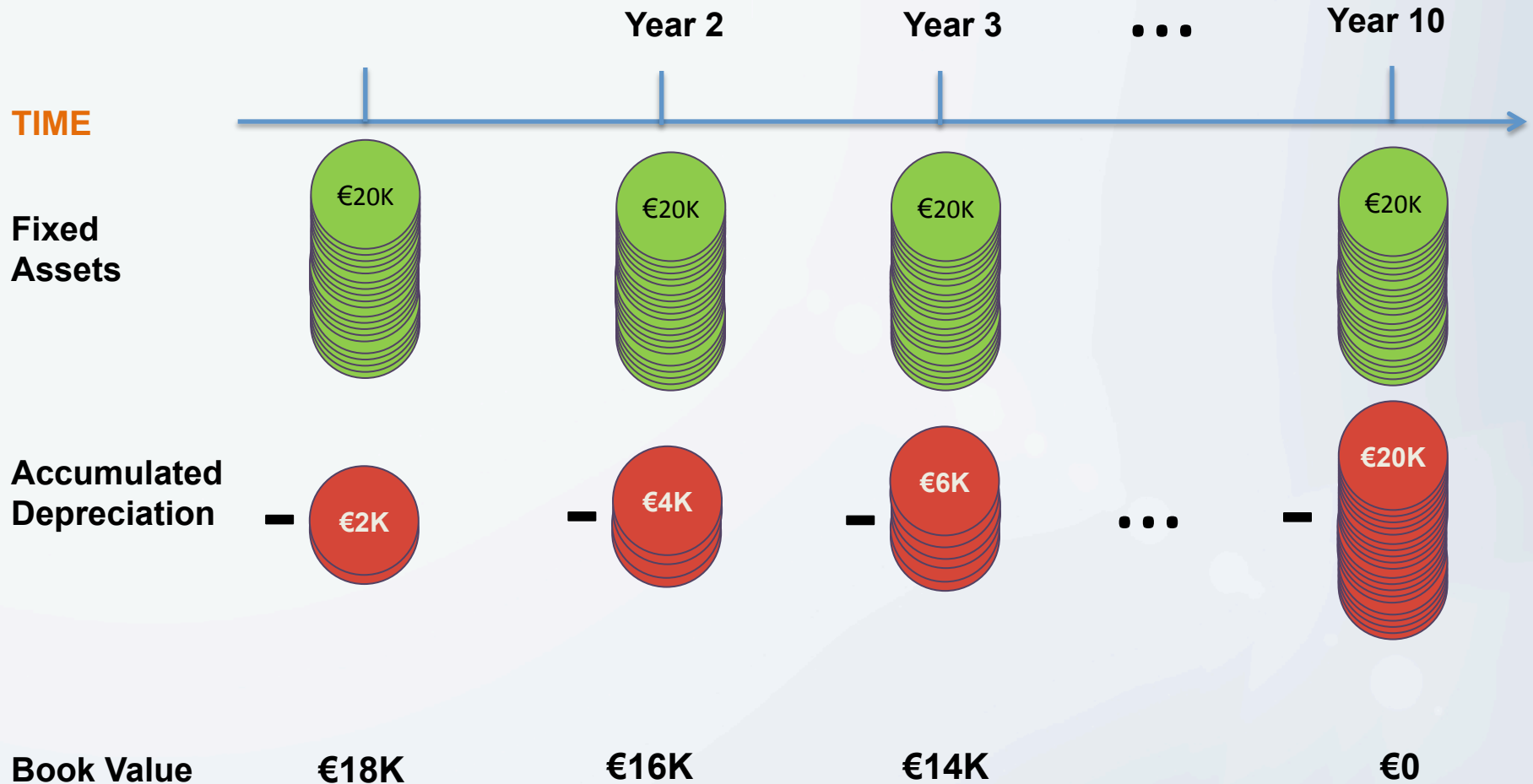
Ordinary Shares

Retained Earnings

€25,000



TEN YEAR DEPRECIATION



WHAT DID WE COVER?

p. 12

- Review the Income Statement and Balance Sheet
- The Balance Sheet always balances
- How the money flows in the financial statements
- The Income Statement and Balance Sheet are linked
- Retained Earnings helps grow the business
- For every scenario there will be at least two accounts affected (Double entry accounting)





BREA

Dealer Health Assessment

Assess

Consult

Align

Execute



DEALER HEALTH ASSESSMENT

p. 13

Why?

- It is the core and foundation of every dealer
- Balanced approach to understanding financial condition
- Uncovers opportunities that may not be obvious
- Retail performance influences Dealer Health
- Understanding Dealer Health improves your credibility



DEALER HEALTH ASSESSMENT

p. 14



DEALER HEALTH ASSESSMENT

Dealer #

| Key Performance Indicator | Definition | Calculation | KPI Importance | Possible Probing Que |
|---------------------------|--|---|----------------|----------------------|
| 3-year Sales CAGR (%) | Indicates the growth rate of the dealership's sales revenue over the past 3 years. | $((\text{Year 3 Sales} / \text{Year 0 Sales})^{(0.333)}) - 1$ | | |
| Gross Margin (%) | The highest "level" of profitability. Indicates if the business is making money | Gross Profit / Net Sales | | |



For each KPI:

- Why is the KPI important? What does it tell you – in plain language, not finance-speak?
 - Document team thought in Why-KPI column.
- What are the potential business drivers of the KPI?
 - Document in column.

PERSONALIZE IT



TEAM SWOT ANALYSIS

p. 16

- Based upon the KPI values and additional insights you just developed, add key observations to a SWOT matrix of the dealership.
- Share your SWOT observations with the large group.



Internal Assessment

External Assessment

| | |
|--|--|
| <u>Strengths</u> <ul style="list-style-type: none">• Good ROS• Good ROA• Debt to Equity seems solid | <u>Weaknesses</u> <ul style="list-style-type: none">• Sales \$ are declining (unit sales down)• Son's poisoning relationship• Gross margin is eroding• High Current Ratio• Cash is down. Payroll late.• Receivables are high.• Daily huddles don't occur.• Customers are not feeling valued.• Sales process isn't customer centric. |
| <u>Opportunities</u> <ul style="list-style-type: none">• Expanding middle class | <u>Threats</u> |

Red- Items added during Balanced Scorecard

Connections



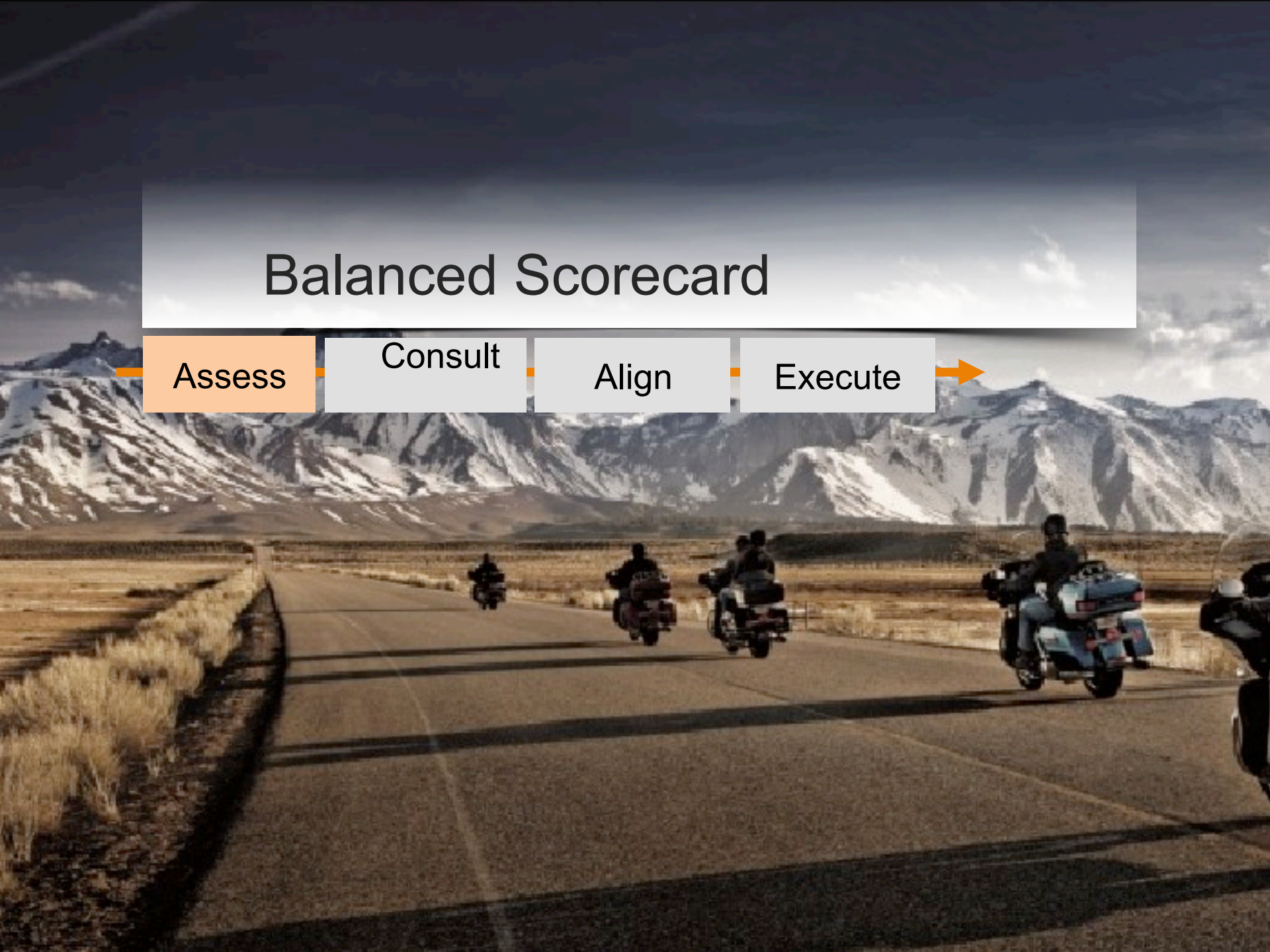
Balanced Scorecard

Assess

Consult

Align

Execute



BALANCED SCORECARD DIMENSIONS

p. 17

- Retail performance is highlighted
- Customers point of view is integrated
- The market's performance is visible
- Highlights key processes



Dealer Health

WHY A BALANCED SCORECARD?

Field's direct
scope of
influence

Highlights multiple
opportunities

- *Relies on you to prioritize based on your business goals*

Holistic view of the business' key
elements that drive retail performance

- Qualitative and Quantitative
- Sustainability indicators



BALANCED SCORECARD

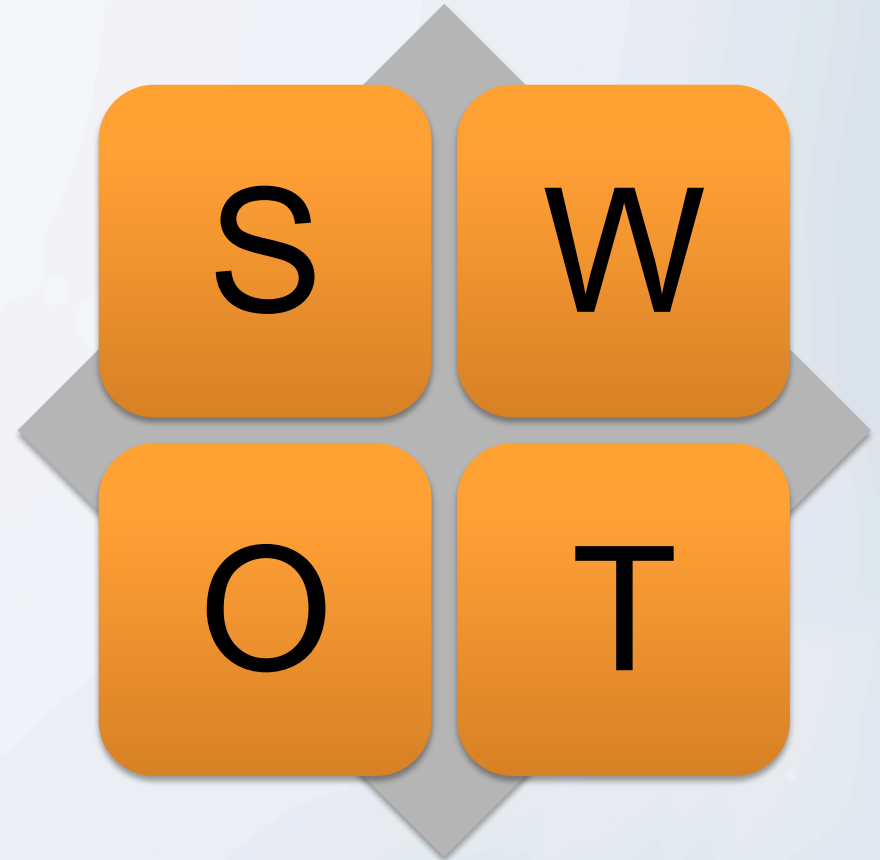
p. 18

| BALANCED SCORECARD | | | |
|-------------------------------------|---|---------|--|
| Dealer # | | 1234 | |
| | Question | Score | Reason For Score |
| Financial Health | | | |
| Profitability | How would you describe the dealership's overall profitability? | Average | Notes |
| Stability | How would you describe the dealership's overall financial stability? | Average | Notes |
| Retail - Performance to Plan | | | |
| Vehicle Performance | How would you describe the dealer's Vehicle Sales department performance against their plan? If no plan, how would you describe performance versus previous year? | Poor | Dealer is down 10% YOY vs PY in new vehicle sales. District is up 6% YOY vs PY in new vehicle sales. National average is up 5% YOY vs PY in new vehicle sales. |
| P&A Performance | How would you describe the dealer's P&A department performance against their plan? If no plan, how would you describe performance versus previous year? | Average | Notes |
| GM Performance | How would you describe the dealer's GM department performance against their plan? If no plan, how would you describe performance versus previous year? | Good | Notes |
| Finance Performance | How would you describe the dealer's F&I department performance against their plan? If no plan, how would you describe performance versus previous year? | Average | Notes |
| Market KPI's | | | |
| Market Share | How would you describe the dealer's current performance in Market Share? If unknown or no market data available, choose N/A | Poor | Dealers' market share is 5% lower than National Average |
| Market Share Trend | How would you describe the dealer's Market Share trend over the past 3 years? If unknown or no market data available, choose N/A | Poor | Rolling 3 year trend is negative 1.5% |



IMPROVING YOUR POINT OF VIEW THROUGH SWOT - BUILDING ON ~~THE BALANCED SCORECARD~~

- Based upon the Balanced Scorecard, add those to the existing SWOT you began to build based on Dealer Health.
- We'll share your thoughts with the group



The District Overview

Assess

Consult

Align

Execute





DISTRICT OVERVIEW

District is meeting plan for **Vehicle Sales**

No

Commentary

Sales of new vehicles have continued to soften as unemployment and residual values have fallen. Used bikes are trending up, while less profitable, dealers (specifically sales managers) are still meeting their monthly total sales volume targets while H-D's new targets aren't in reach

District is meeting plan for **General Merch**

Yes

Commentary

Addition of ARO and a new dealership opening has buoyed GM

District is meeting plan for **Parts & Access**

Yes

Commentary

PAC sales have strengthened as the ownership cycle has lengthened and customers are putting more into their bikes as they extend their life prior to trade (see used residual challenge above)

Dealer

1234

2341

3456

4567

5678

6789

7890

8901

9012

0123

4321

5432

6543

7654

8765

9876

0987

Dealer Contribution

High

High

Low

Medium

Low

High

Low

Low

Medium

High

Medium

Medium

Medium

High

High

Low

Low

Financial Health

Profitability

Average

Poor

Poor

Average

Poor

Good

Poor

Poor

Average

Good

Average

Average

Average

Good

Good

Good

Poor

Stability

Good

Average

Poor

Average

Poor

Good

Poor

Average

Good

Good

Good

Average

Good

Good

Average

Good

Poor

Retail - Performance to Plan

Vehicle Performance

Average

Poor

Poor

Average

Poor

Average

Poor

Poor

Average

Good

Average

Poor

Average

Good

Good

Poor

Poor

P&A Performance

Poor

Good

Poor

Average

Good

Good

Poor

Poor

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Average

Average

Average

Average

Good

Good

Poor

Average

GM Performance

Poor

Good

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Finance Performance

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Poor

Average

Market KPIs

Market Share

Good

Poor

Poor

Good

Average

Good

Poor

Good

Good

Good

Average

Average

Good

Good

Average

Good

Good

Market Share Trend

Average

Poor

Poor

Average

Average

Average

Poor

Average

Good

Good

Average

Average

Average

Good

Good

Average

Poor

CXI KPIs

CXI - Vehicle

Average

Average

Poor

Good

Good

Good

Poor

Poor

Good

Good

Poor

Average

Poor

Good

Good

Average

Average

CXI - Service

Good

Average

Poor

Average

Good

Good

Poor

Poor

Good

Good

Poor

Average

Average

Good

Good

Poor

Poor

Your District Overview

On your own:

- Fill out any information in your District Overview that you did not complete as pre-work
- Identify 2-3 dealers on whom you will concentrate your efforts

PERSONALIZE IT



Debrief - District Overview

- Update the group on your District Overview
- What has changed?
- Which dealers have you chosen to focus on and why?

PERSONALIZE IT

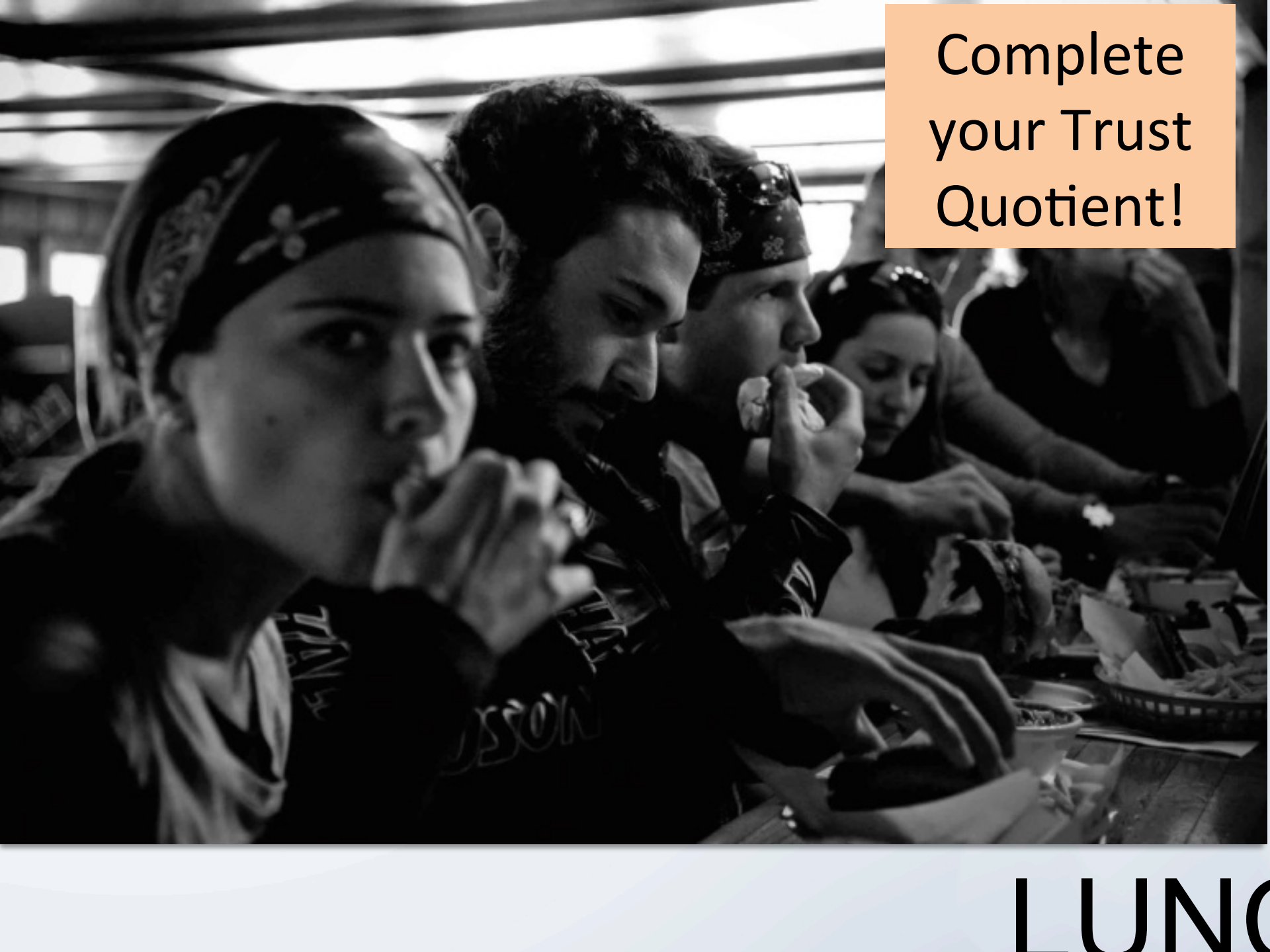


THE CASE OF THE DREAMING DEALER

p. 20

- Midway Harley-Davidson, in business 25 years, recently bought by Jo, a new DP with no retail background.
- Many legacy staff members, including Shawn, the Sales Manager. Shawn's dad is the former DP.
- Dealership performance is down under Jo.
- Jo thinks it will take care of itself in "a few more months"





Complete
your Trust
Quotient!

LUNC



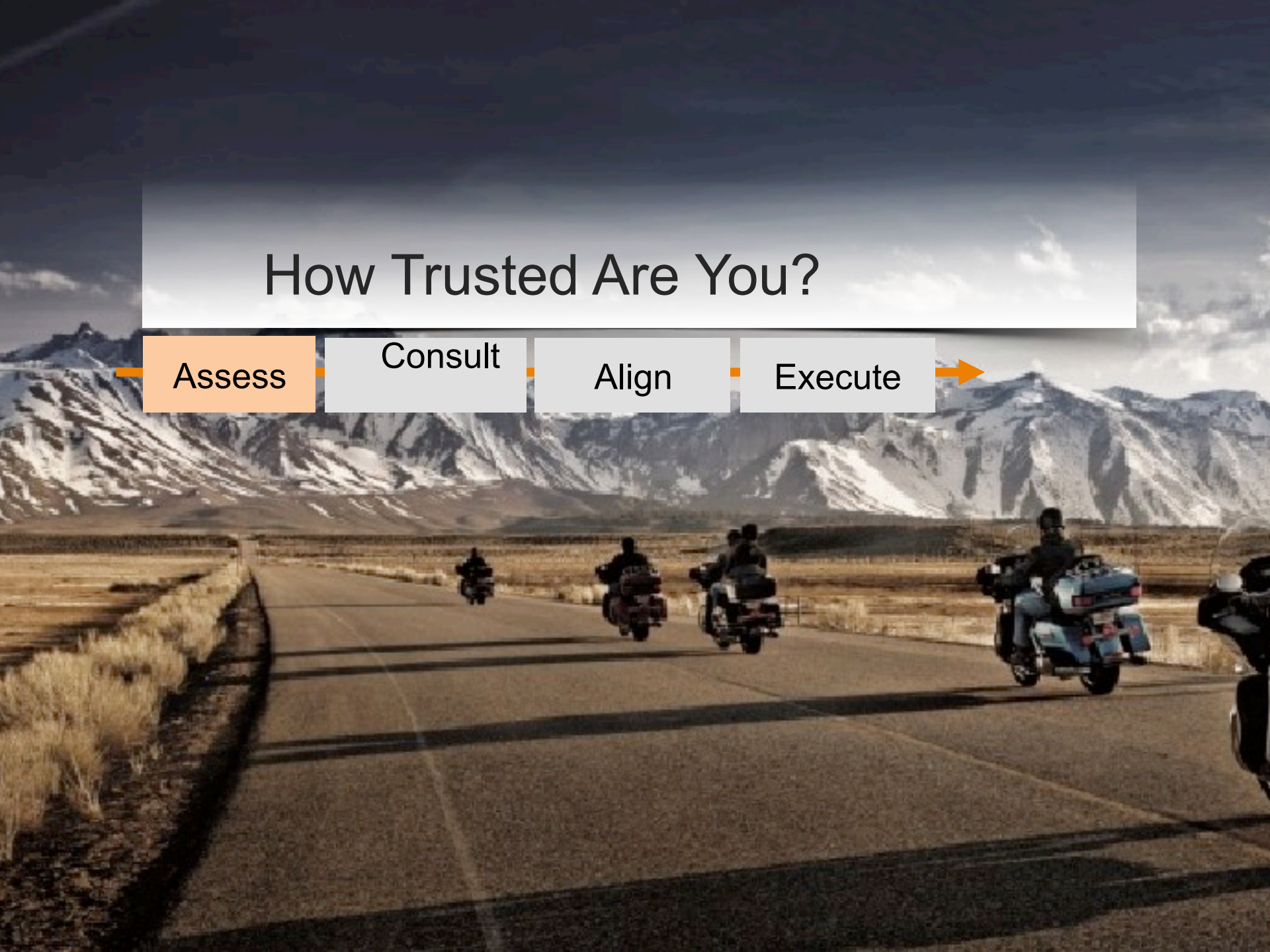
How Trusted Are You?

Assess

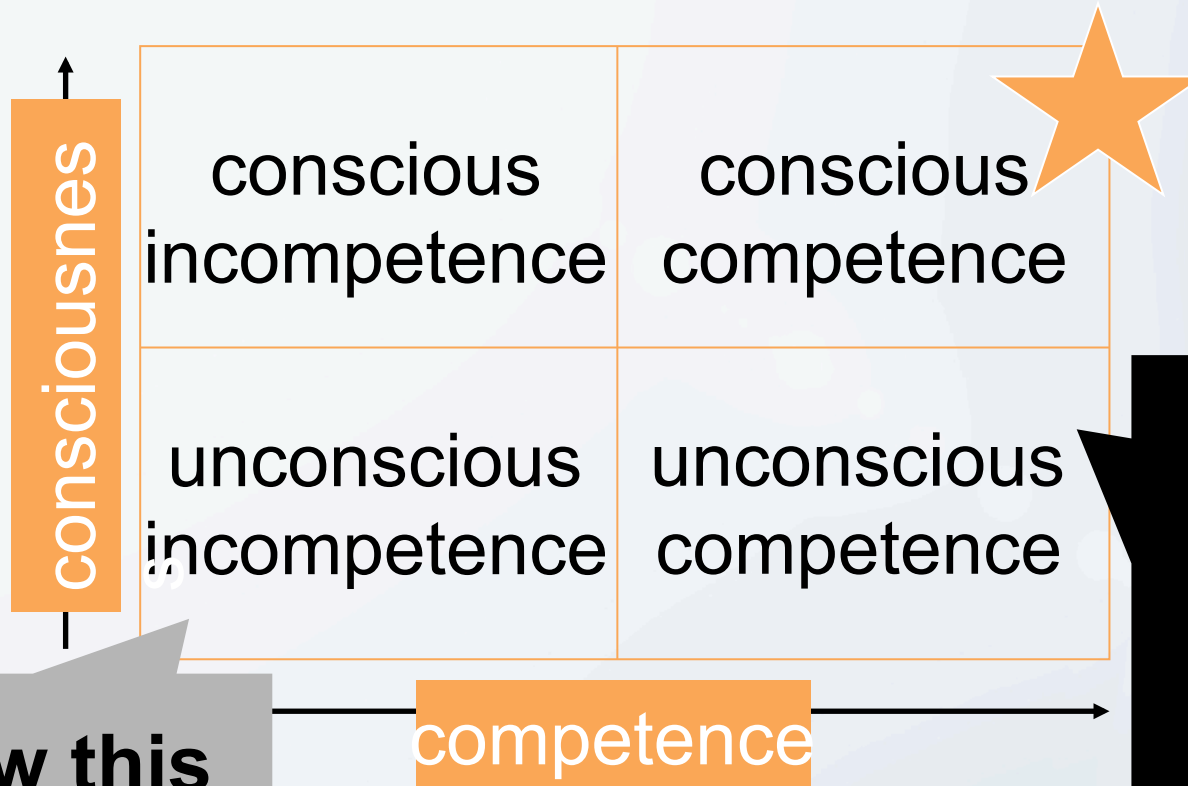
Consult

Align

Execute



BEING TRUSTED TAKES SOMETHING



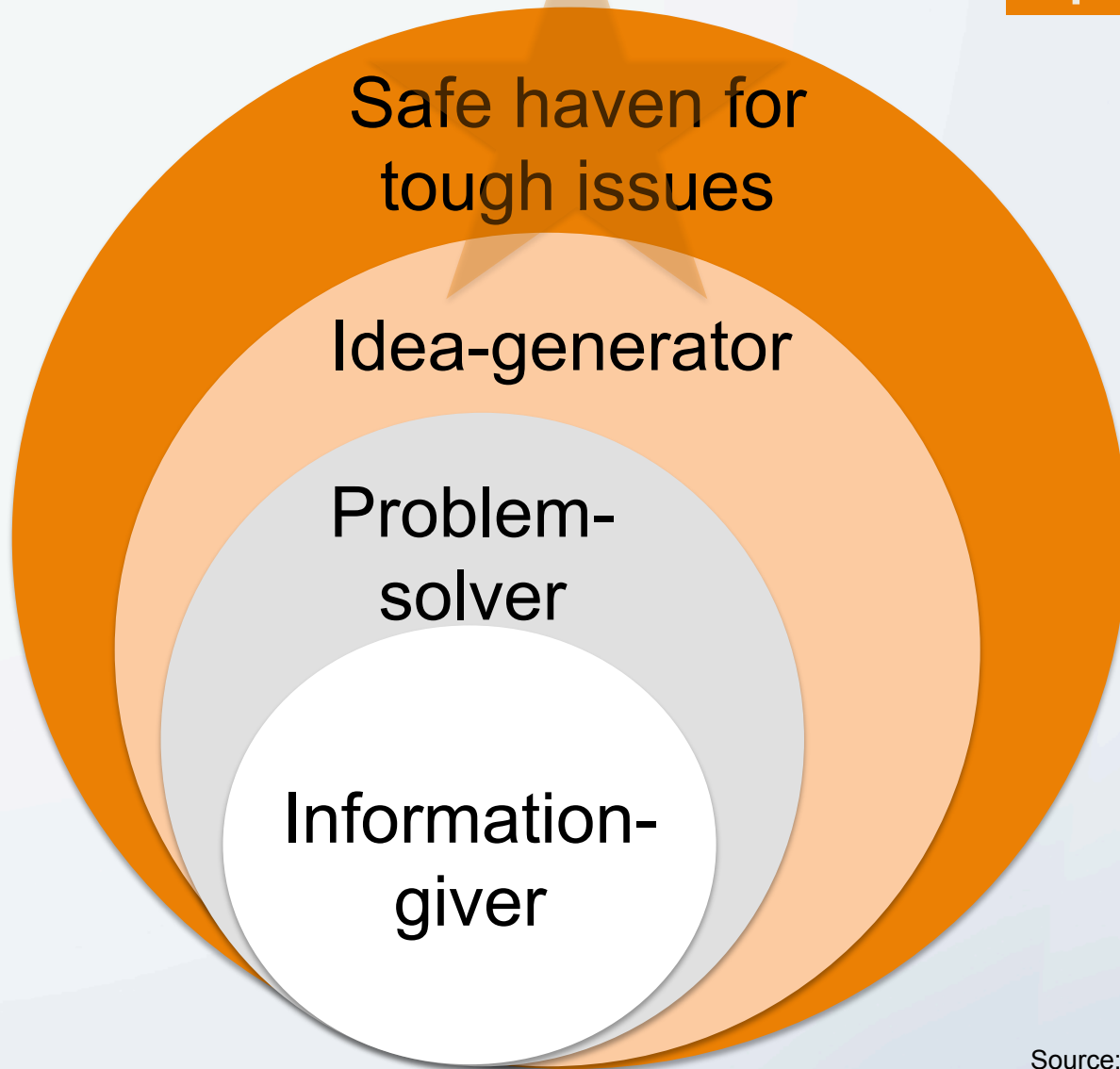
“I know this
already
(yawn).”

“I just do
what’s
right.”



FOUR LEVELS OF RELATIONSHIP

p. 25



WHO'S YOUR TRUSTED ADVISOR?

Someone in your life to whom you would turn for advice on a wide range of topics, including sensitive ones both professional and personal

What words would you use to describe this person?

FORGET THE DICTIONARY



THE TRUST EQUATION

p. 27

A tool that brings clarity to ambiguity

$$T = \frac{C + R + I}{S}$$

T trusted
C credibility
R reliability
I intimacy
S self-orientation



“We have over
110 years of
experience in
taking care of
riders and
their
motorcycles
on every
aspect of the
journey”

Source: *The Harley-Davidson Customer Experience*



CREDIBILITY = WORDS

p. 28

Words

Credibility

Truthfulness
Credentials

*I trust what she
says about...*



CREDIBILITY BEHAVIORS

“I trust what she says about ...”



INSTRUCTION

NS

Identify 3 – 5 DM behaviors that build credibility *quickly*.

List specific things you might say or do.



A photograph of two motorcyclists riding a large orange and black Harley-Davidson motorcycle on a winding asphalt road. The rider is wearing a black helmet and jacket, and the passenger is also in black gear. The background features a scenic landscape with green hills, trees, and snow-capped mountains under a bright sky. The motorcycle has a license plate that reads "992699".

**KICK-ASS CUSTOM
EXPERIENCES**

**→ DELIVERED
EVERYTIME
for
EVERYONE**

RELIABILITY = ACTIONS

Words

Actions

Credibility

Reliability

Truthfulness
Credentials

*I trust what she
says about...*

Dependability
Predictability

I trust him to...



RELIABILITY BEHAVIORS

“I trust him to ...”



INSTRUCTION

NS

Add 3 – 5 specific
DM behaviors that
accelerate reliability.



EXPERIENCE

BEHAVIORS

Trusted

- I respect and greet them with a smile
- I make them feel at home
- I invite them to touch and engage with our products
- I demonstrate knowledge and instill confidence

Personalized

- I get to know and use their names
- I offer personalized solutions
- I learn their stories and share mine
- I am their personal guide along their journey

Social

- I create connections and opportunities to interact
- I invite participation in events and activities
- I engage their family and friends
- I celebrate their key milestones

INTIMACY = SAFETY

Words

Actions

Safety

Credibility

Reliability

Intimacy

Truthfulness
Credentials

*I trust what she
says about...*

Dependability
Predictability

I trust him to...

Discretion
Empathy
Risk-taking

*I trust her
with...*



INTIMACY BEHAVIORS

“I trust her with ...”



INSTRUCTION

NS

Add 3 – 5 specific DM behaviors that increase intimacy quickly.



DELIVERING OUR COMPANY PURPOSE



SELF-ORIENTATION = FOCUS

Words

Actions

Safety

Focus

Credibility

Reliability

Intimacy

Self-

Orientation

Truthfulness
Credentials

Dependability
Predictability

Discretion
Empathy
Risk-taking

Motives
Attention

*I trust what she
says about...*

I trust him to...

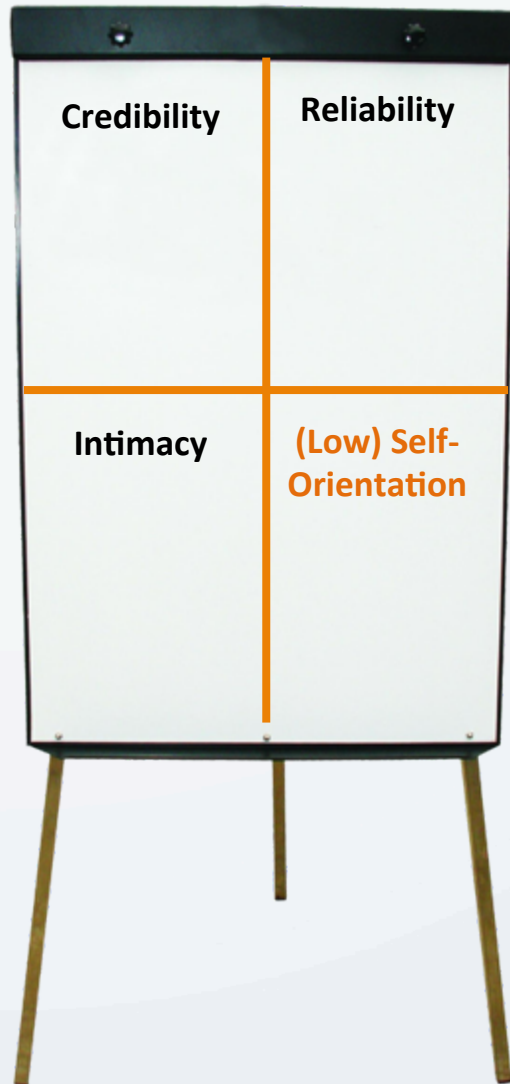
*I trust her
with...*

*I trust that he
cares about...*



(LOW) SELF-ORIENTATION BEHAVIORS

“I trust that he cares about ...”



INSTRUCTION

NS

Add 3 – 5 specific
DM behaviors for
“getting off your ‘S’”
... *fast*.



YOUR TRUSTED ADVISOR

p. 19

How do they score?

$$T = \frac{C + R + I}{S}$$

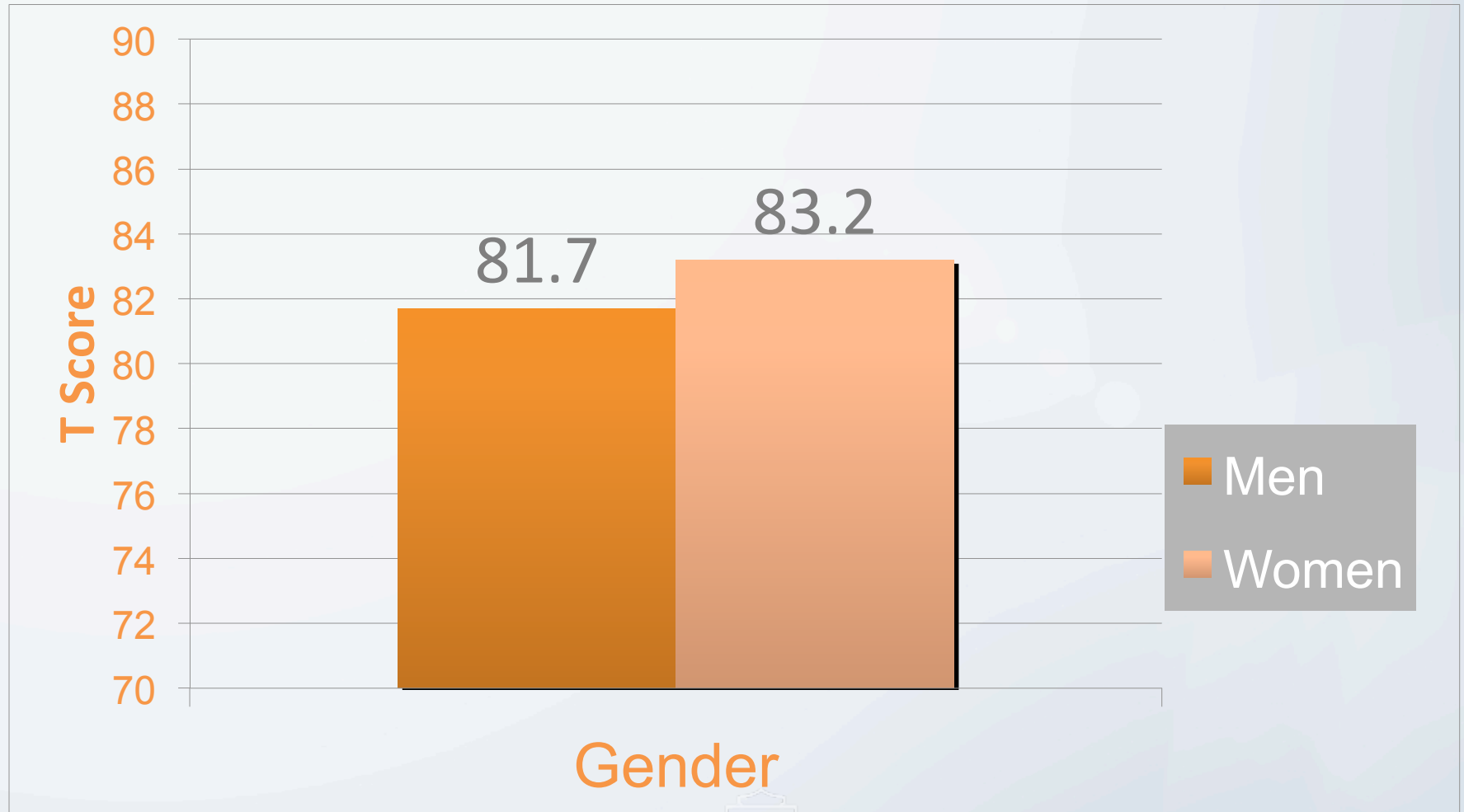
T trusted
C credibility
R reliability
I intimacy
S self-orientation



WHO'S MORE TRUSTED?

Men or women?

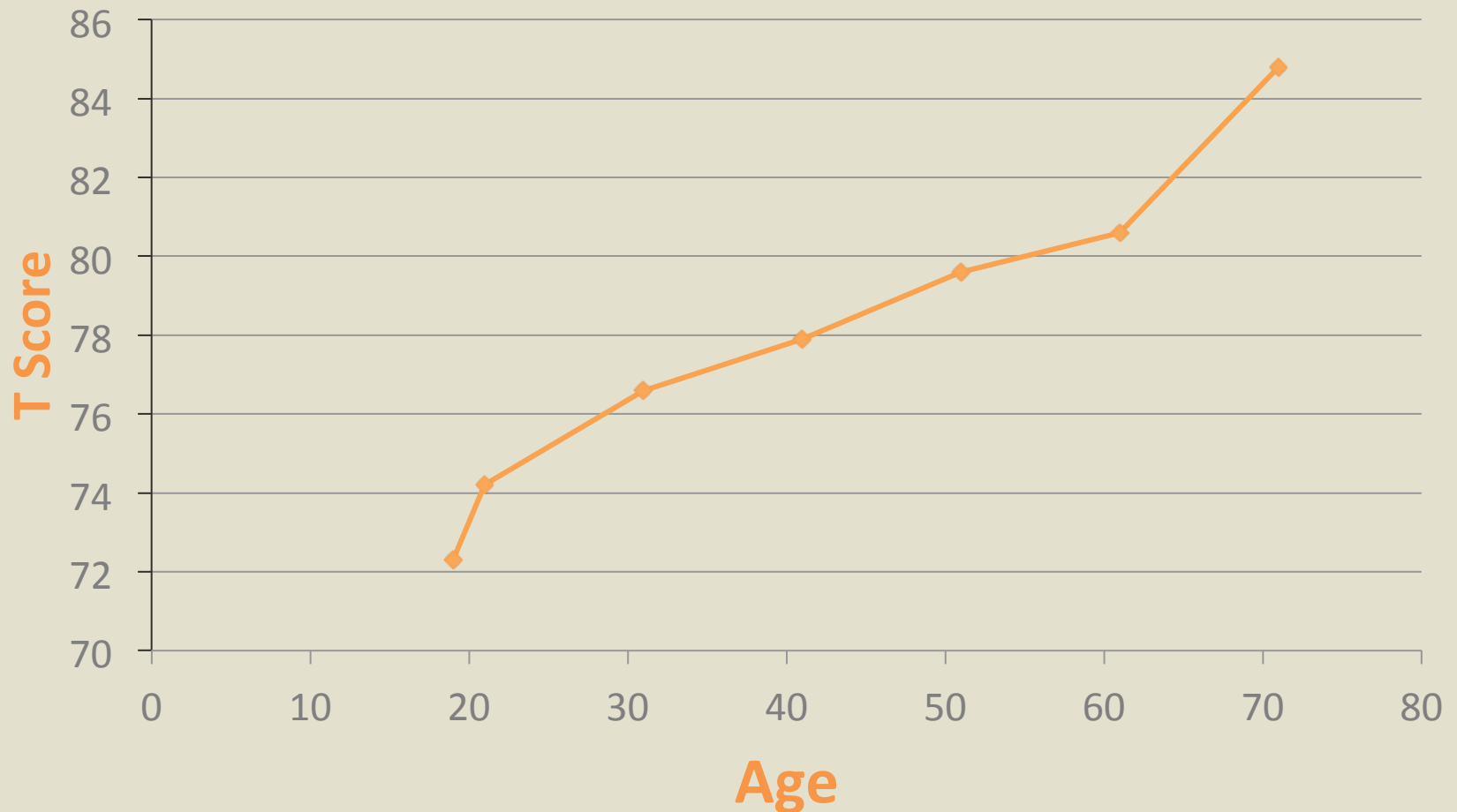
N = 12,058



AS WE AGE ...

... are we more or less trusted?

N = 6,512

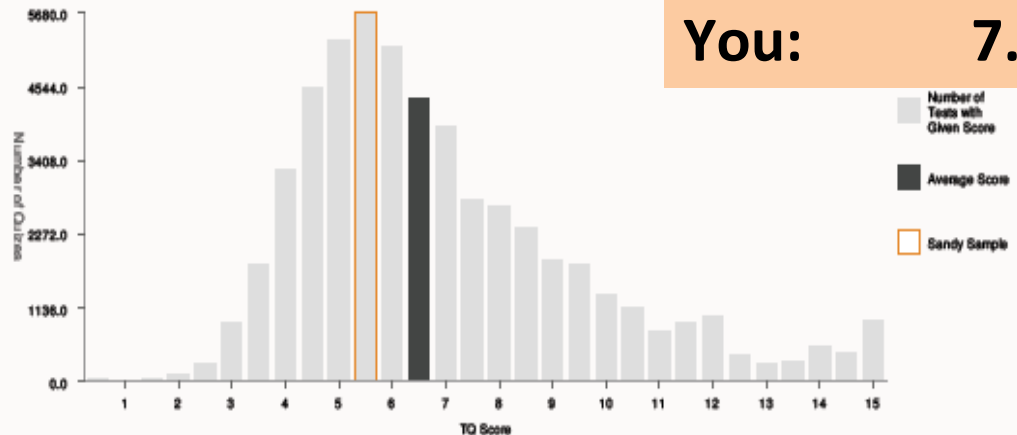


YOUR TQ

Note: Median
skewed left
(3 x S)

Trust Quotient Personal Report for: Sandy S.

SECTION I: YOUR TRUST QUOTIENT IS 5.8 (SELF-SCORED)

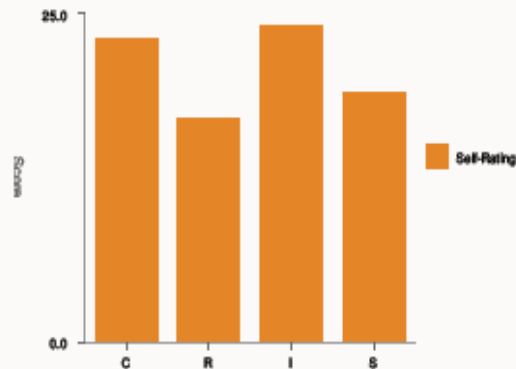


Avg. TQ Scores:

World: 6.6

You: 7.4

SECTION II: YOUR COMPONENT SCORES



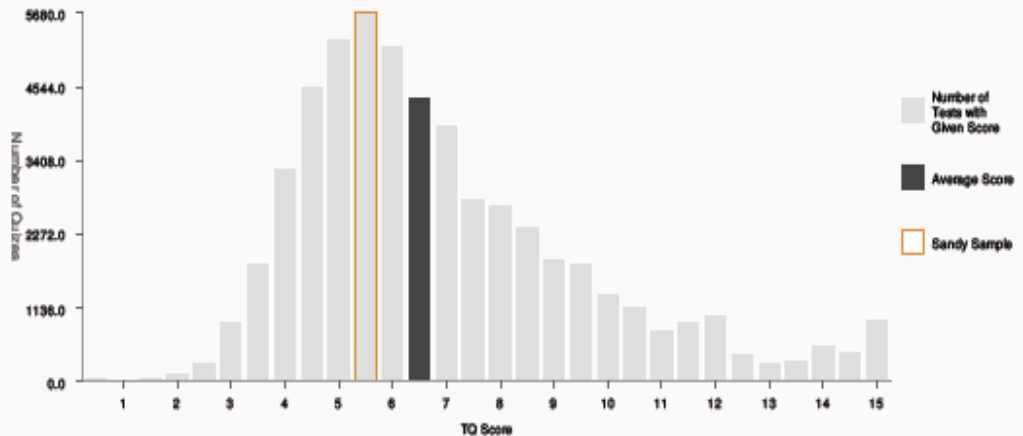
You rated yourself:

Credibility: 23 | Reliability: 17 | Intimacy: 24 | Self-Orientation: 19

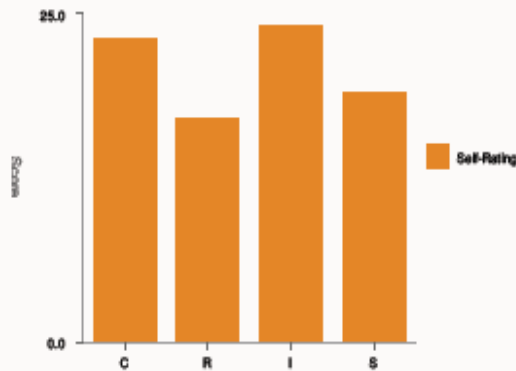
SECTION III: YOUR TRUST TEMPERAMENT™ (SELF-SCORED): THE CATALYST

Trust Quotient Personal Report for: Sandy Sample

SECTION I: YOUR TRUST QUOTIENT IS 5.8 (SELF-SCORED)



SECTION II: YOUR COMPONENT SCORES



You rated yourself:
Credibility: 23 | Reliability: 17 | Intimacy: 24 | Self-Orientation: 19

SECTION III: YOUR TRUST TEMPERAMENT™ (SELF-SCORED): THE CATALYST

Tip: Focus
most of your
time and
energy here



| Question | Relation | Score |
|----------|----------|-------|
|----------|----------|-------|

INTIMACY

I am not afraid to take emotional risks by being open about myself: to acknowledge some failing about myself, or to engage in a conversation where I'm not an expert, and to admit my limitations.

Self Rating

4.0



People confide in me: they tell me things they often don't tell others; they share with me things they consider private or personal.

Self Rating

3.0



I am comfortable taking personal risks by engaging with the other person: I know that my intentions are good and am confident that the other person will see that; hence I am comfortable asking questions or raising topics that others in my position might avoid out of fear of appearing controversial or intrusive.

Self Rating

4.0



I empathize with others, and am at ease letting them know it: people have all kinds of feelings; I'm sensitive to them all, and am comfortable sharing my own responses to their feelings, and they know that and appreciate it.

Self Rating

4.0



I'm known to be discreet: people will talk to me about issues of personal or professional concern to them, even if I'm not an expert in that area, because they know I'll keep things between us.

Self Rating

5.0



1 = Almost Never

2 = Rarely

3 = Sometimes

4 = Often

5 = Almost Always

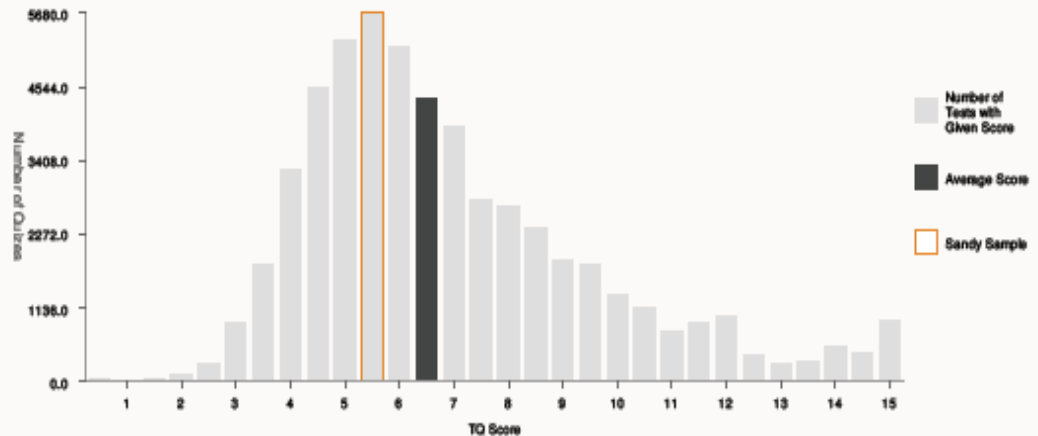
And more specifically



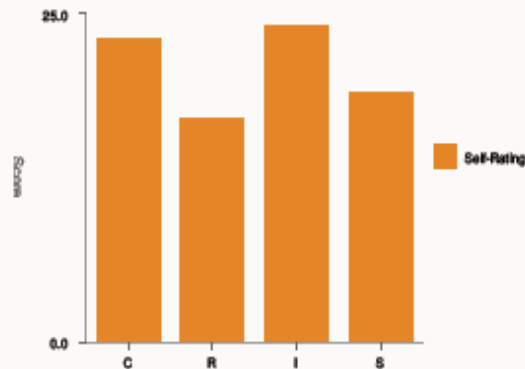
Your Trust
Temperament™
is your *innate
preference* when
it comes to trust-
building

Trust Quotient Personal Report for: Sandy Sample

SECTION I: YOUR TRUST QUOTIENT IS 5.8 (SELF-SCORED)



SECTION II: YOUR COMPONENT SCORES

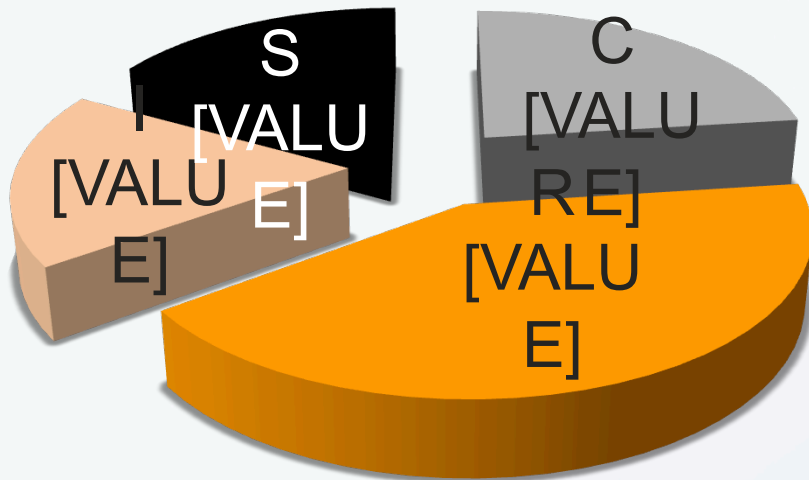


You rated yourself:

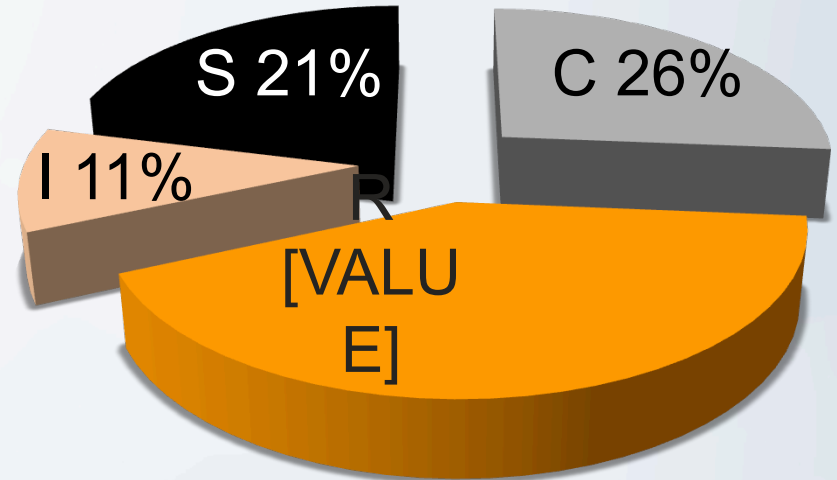
Credibility: 23 | Reliability: 17 | Intimacy: 24 | Self-Orientation: 19

SECTION III: YOUR TRUST TEMPERAMENT™ (SELF-SCORED): THE CATALYST

HOW YOU SEE YOUR STRENGTHS



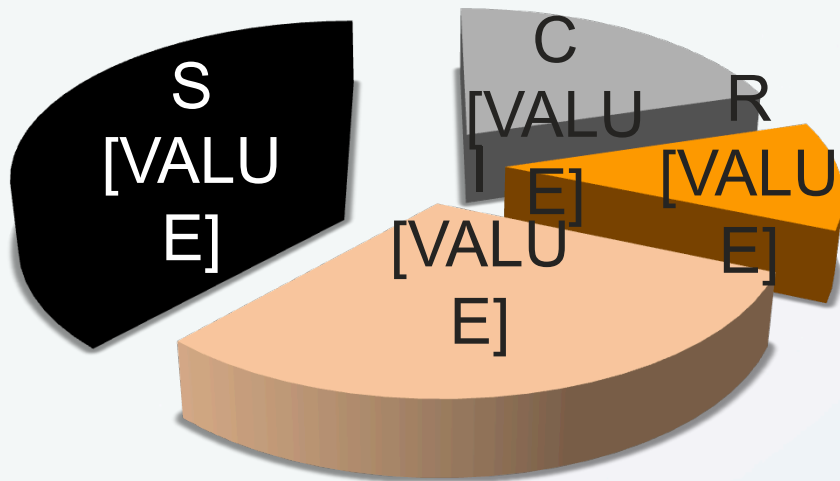
Total Population
N = 63,939



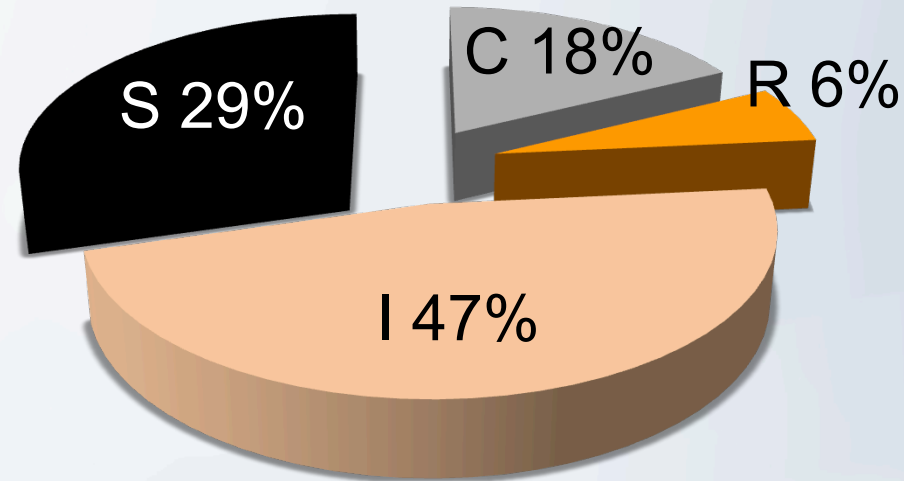
You
N = 14



HOW YOU SEE YOUR OPPORTUNITIES



Total Population
N = 63,939



You
N = 14



Prioritizing Dealers

On your own:

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1. What have you (re)learned about your strengths?
2. What aspects of being trusted do you tend to leave behind? Why?
3. How do you see #1 and #2 playing out with your top three dealers?
Actions you might take?

PERSONALIZE IT



Prioritizing Dealers (con't)

At your tables:

- Rethink your top 3 priority dealers
 - *Are there any you didn't choose—and should have--because of relationship challenges?*
- Based on your revised top 3, select ONE dealer each on whom you will focus
- Complete your Dealer Visit Planner for your ONE dealer

PERSONALIZE IT





BREA

THE CASE OF THE DREAMING DEALER

- Jo, the DP, is “drawing heavily” on the experience of Shawn, the Sales Manager, to help right the business
- Kim, the DM, and Jo have not yet built a close relationship
- Jo typically turns strategic conversations toward solving immediate problems instead



Imagine you're Kim,
the District
Manager:

- What's your minimum acceptable outcome for this conversation?
- What's your ideal outcome?



PITFALL

1. Inadequate prep
2. Using data to “win”
3. Problem-solver
4. C and R
5. Surface issues
6. Outcomes reversed

ALTERNATIVE

- Anchored in reality
- Being judicious
- Safe haven
- C R I S
- True, root issues
- Relationship focus

CRIS BEHAVIORS

Know the story
the numbers
tell

Listen

$$T = \frac{C + R + I}{S}$$

Prove we
care





BREA

ASSESS CONSUL ALIGN EXECUTE

Grow the Business

| | Identify opportunities in your district | Lead effective conversations, consistently | Generate consensus on opportunities and action plans | Create mutual accountability |
|-----------|--|--|--|------------------------------|
| Tools | <ul style="list-style-type: none">• Dealer Health Assessment• Balanced Scorecard• District Overview• The Four Levels of Relationship• The Trust Equation | | | |
| Behaviors | <ul style="list-style-type: none">• Analyze data, make linkages and draw conclusions• Assess the state of your relationship | | | |



Dealer Visit Planner

Assess

Consult

Align

Execute





Dealer #

Dealer Name

Site Visit Date

1. DETERMINE PRIMARY AREAS OF FOCUS BASED ON DEALER'S FINANCIAL HEALTH ASSESSMENT AND BALANCED SCORECARD

| Primary Areas of Focus | Metrics / Observations that Support Need for Action |
|------------------------|---|
| | |
| | |

Your Dealer Visit Planner

- Tonight, working with your Market Team, complete a Dealer Visit Planner for your priority dealer.
- Focus on the following fields:
 - Objectives (three)
 - Benefit to the dealer
 - Anticipated concerns
 - Questions you have for dealer

PERSONALIZE IT



KEY TAKEAWAYS



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