

ENSURING F&I EXCELLENCE!™ OBSERVATION CHECKLIST

DETAILS

Dealership		F&I Manager	
Customer		Date Recorded	
Total Time of Deal	Min: Sec	R&A Coach	
Deal/Stock #		Finance <input type="checkbox"/>	Outside Lien <input type="checkbox"/> Cash <input type="checkbox"/> Lease <input type="checkbox"/>

YES	NO	NEEDS DISCOVERY																									
<input type="checkbox"/>	<input type="checkbox"/>	Camera on for entire transaction?																									
<input type="checkbox"/>	<input type="checkbox"/>	Time FSM spent discovering customer needs before presenting menu																									
<input type="checkbox"/>	<input type="checkbox"/>	Open-ended needs discovery questions asked? Enter number asked below																									
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Used drawing to explain factory warranty?																									
YES	NO	MENU PRESENTATION																									
<input type="checkbox"/>	<input type="checkbox"/>	Presented products using a menu?																									
<input type="checkbox"/>	<input type="checkbox"/>	No selling first time through?																									
<input type="checkbox"/>	<input type="checkbox"/>	Gave customer ownership of their options?																									
<input type="checkbox"/>	<input type="checkbox"/>	Asked customer to buy a package?																									
<input type="checkbox"/>	<input type="checkbox"/>	Attempted to sell multiple products?																									
YES	NO	DEMO RIDE																									
<input type="checkbox"/>	<input type="checkbox"/>	Used needs discovered to show how product(s) would benefit customer?																									
<input type="checkbox"/>	<input type="checkbox"/>	Used factory warranty drawing to demonstrate need for VSA?																									
<input type="checkbox"/>	<input type="checkbox"/>	Used GAP drawing to demonstrate need for GAP?																									
<input type="checkbox"/>	<input type="checkbox"/>	Used component part to demonstrate need for VSA?																									
<input type="checkbox"/>	<input type="checkbox"/>	Used other visual aid to demonstrate need for:																									
YES	NO	OBJECTIONS																									
<input type="checkbox"/>	<input type="checkbox"/>	Responded positively, acknowledged their concern?																									
<input type="checkbox"/>	<input type="checkbox"/>	Demonstrated empathy before addressing customer's concern?																									
<input type="checkbox"/>	<input type="checkbox"/>	Asked trial closing questions that ensured a "Yes"?																									
<input type="checkbox"/>	<input type="checkbox"/>	Able to overcome the customer's objection(s)?																									
YES	NO	COMPLIANCE																									
<input type="checkbox"/>	<input type="checkbox"/>	Buyers order properly disclosed. Confirmed the numbers & base payment (finance/lease)																									
<input type="checkbox"/>	<input type="checkbox"/>	Presented all products as optional along with the costs																									
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed products selected. Utilized Customer Waiver/Acknowledgement Form as needed																									
<input type="checkbox"/>	<input type="checkbox"/>	Customer took possession of the contract, given time to review prior to execution																									
<input type="checkbox"/>	<input type="checkbox"/>	Explained all paperwork before asking customer to sign																									

OBSERVATIONS