



## Customer Presentation Certification Checklist

- 1 . Greeter has three items before greeting the customer: (These items must be pulled in less than 20 seconds) Pass / Fail
- Previous Synfast History- print out (preferable) (1 pt.)
  - Manufacturer's recommendation for oil (in check chart) (1 pt.)
  - Synfast Oil Selection Guide (1 pt.)
- The greeter could not begin the presentation due to a rush of cars, but acknowledged the customer immediately. (2 pts.)
2. The Customer was greeted within 20 seconds from pulling into the parking lot (1 pt.)
3. The greeter was Friendly (smiled) (1 pt.)
- Welcomed the customer in a respectful manner (Sir, Madam, or by name) (1 pt.)
  - Introduced themselves by name (1 pt.)
  - Asked: "How may I help you today?" (1 pt.)
4. The greeter let the customer decide what he/she wanted us to service for him/her: (2 pts.)
- "I want an oil change."
  - "I would like \_\_\_\_\_ service."
5. a. For New Customers: If the customer wanted an unspecified oil change, the greeter explained the oil changes that we offer from the best oil to the good oil (from Full Synthetic to Blend) along with all of the promotions that we currently offer. (7 pts.)
- "We will get that oil change done for you as fast as we can."
  - "Here are the choices and special promotions that we can offer you for motor oil."
  - The greeter used the Oil Selection Guide to explain the benefits of each oil (from Full Synthetic to Blend)
  - The greeter Informed the customer if the manufacturer required a synthetic based oil
  - The greeter recommended High Mileage if the vehicle had more than 75k miles.
  - Clarified that all oil changes over 5 quarts of oil had a minimal extra charge per quart
  - Explained about Castrol GTX Ultraclean last



Pass / Fail

5.b. For Repeat Customers that used premium oil before, the greeter mentioned: (2 pts.)

- "I see that on your last visit your vehicle used Castrol Edge, it lasts up to 7 mo/ 7k miles, whichever comes first, with superior engine protection, and it's our best oil at just \$\_\_\_\_\_, up to 5 quarts, plus a minimal disposable fee."

5.C. For customers that requested an economical oil change, the greeter mentioned: (3 pts.)

- "We currently offer our Castrol GTX Ultraclean oil change, it is a synthetic blend oil, it covers up to 5 quarts of oil and it lasts up to 3k miles for just \$\_\_\_\_\_ plus a minimal disposable fee."
- "We also have great savings offers on our best Castrol premium oils that will better fit your engine's needs."
- "Would you like to hear more about them?"

5.d. If the customer says "NO" to premium oils, the greeter states: (3 pts.)

- "Ok, I will get that done for you as soon as I can."
- "You are getting a great value for our Castrol GTX Ultraclean oil change!"
- "It includes a 25 pt. maintenance check, which includes to check all fluids, belts, filters, hoses, tire pressure and brakes for you today at no extra charge."

➤ *Educated the customers on the best oil that suits their vehicle's needs.* (2 pts.)

6. Closed the greeting with: (2 pts.)

- "We can get your oil change done in about 15 minutes including the 25 pt. full maintenance check."
- If the customer chose to wait in our lobby, the greeter guided them in safely.



Pass / Fail

7. Presented the recommendations of additional services with: (2 pts.) □ □
- "We completed our 25 pt. maintenance check, which included to check your vehicle's coolant fluid and hoses, transmission fluid, brake pads, belts, air filter and to add window washer fluid and tire pressure."
  - "Here are the other services that I recommend doing for your vehicle. We do offer these services here as well and we can get these done for you in less than 15 minutes (time frames may vary)."
8. Explained each additional recommended service, including: (4 pts.) □ □
- Why they made the recommendation
  - Explained the recommendations in order of priority
  - Did not recommend more than 3 additional services, unless, in rare cases, there are more than 3 urgently needed services.
  - Explained the price *clearly*
- Only if the customer declined an extra service, the greeter did offer our current specials of: (3 pts.) □ □
- \$10 off any 1 additional service with oil change
  - \$20 off any 2 additional service with oil change
  - \$30 off any 3 additional service with oil change
- If brakes were recommended, the greeter mentioned: (3 pts.) □ □
- Free Castrol GTX Essential conventional oil change with brakes service (up to 5 quarts)
  - \$20 off High Mileage oil change with brakes service
  - \$25 off Full Synthetic oil change with brakes service
9. Tried to physically show the customer the recommended services, especially the safety items like, brake pads etc. (6 pts.) □ □
- Or he also tried to take a dirty engine air and/or cabin air filter to show the customer while waiting in the lobby.
  - Was honest with the customer and recommend based on the manufacturer's service intervals or Synfast Oil Change's time and/or mileage.
10. The greeter was careful when he brought the customer out into the bay area. (3 pts.) □ □
11. If the customer declined all of the additional services offered, the greeter stated: (4 pts.) □ □
- "That's fine, I will just note the recommendations on your invoice."
  - "Maybe we can do that service for you on your next visit."
  - "We can even schedule an appointment with you to make sure that there's no wait."
  - The greeter treated the customer and the vehicle with respect.



Pass / Fail

12. During the closing of the service, the greeter stated: (2 pts.)
- "My manager will be with you shortly to cash you out Mr./Mrs.\_\_\_\_\_."
  - "Thank you and hope to see you back at Synfast soon."

Total applicable points \_\_\_\_\_

Total points scored \_\_\_\_\_

Passed

Above 80%

Failed

Below 79.9%

Store: \_\_\_\_\_

CSA Name: \_\_\_\_\_

Customer Invoice # \_\_\_\_\_

X

\_\_\_\_\_  
Employee

X

\_\_\_\_\_  
District Manager

X

\_\_\_\_\_  
Certified by

X

\_\_\_\_\_  
Operations Manager