



## Guide Sales Process

### Greet and Engage

#### *Key points:*

- Greet customer with “Welcome to Trek” within 10 feet or 10 seconds of their entry.
- Engage the customer with “What brings you in today?” If they respond “Just looking,” tell them you will check back in with them.
- Approach the customer when they have landed on a product with an interesting fact about the product and an open-ended question.

#### *Practice:*

- Role play greeting within 10 feet/10 seconds.
- Role play greeting when you are on the phone.
- Role play greeting when you are with another customer.
- Role play “What brings you in today?”
- Fun fact & open-ended question game (see Trek University Sales Drills for instructions)

#### *Evaluation:*

- Was the customer greeted within 10 feet or 10 seconds of entering the store?
- Was the salesperson actively working and remaining attentive in between customer interactions?
- How did the salesperson successfully engage the customer?
- Was the customer engaged in an appropriate timeframe?
- Did the salesperson use a fact & open-ended question?
- Did the salesperson invite the customer to check out something interesting in the store?



## Guide Sales Process

### Qualify

#### *Key points:*

- Qualifying is the process of asking questions so that we can best understand a customer's problem. Qualifying well gives us the ability to empathize with the customer and make the best possible recommendations.
- We like to refer to this as collecting dots. You'll connect these dots to product information in the coshopping phase.
- Ask open-ended customers to start a **conversation** with the customer. While we want to ask good questions to learn about the customer, we don't want this to feel like an interrogation.
- Take notes on key information while learning about the customer. Make sure that you know about their context, goals, research, and concerns before moving on.

#### *Practice:*

- Role play asking the right questions to get context, goals, research, and concerns. Do this with two different customer profiles.
- Open-ended question game (see Trek University Sales Drills for instructions)
- Five question bike guess who? (see Trek University Sales Drills for instructions)

#### *Evaluation:*

- Did the salesperson ask open-ended questions to learn about the customer's context, goals, research, and concerns? What dots did they collect?
  - Context?
  - Goals?
  - Research?
  - Concerns?
- Did the salesperson have enough information from the customer to recommend a family of bikes?



## Guide Sales Process

### Plan and Fit

#### *Key points:*

- Tell the customer your plan to overcome their problem:
  - Point out the problem you identified while qualifying (e.g. What I hear you saying is you can't keep up with your friends on your group ride.)
  - We're going to get you fit to the right size bike using the fit kiosk and fit bike (if applicable)
  - We're going to get you out on a test ride
  - We're going to customize the bike for exactly what you need
  - Paint a vision of success for your customer
    - "You'll be shredding the trails like a pro this summer"
    - "You'll be cruising bike paths with your family on Sunday"
    - "You'll be killing it on your group ride next weekend"

#### *Practice:*

- Provide context, research, goals, and concerns for a hypothetical customer. Take turns providing the plan for success. Each employee should practice giving the plan at least once.
- Practice using the fit kiosk and fit bike. Employees pair up, and each selects a bike to be fit to. Take turns using the fit kiosk to identify frame size and saddle height and using the fit bike to confirm frame size and starting saddle height. Write it down, and practice using a tape measure to set seat height for a test ride; measure center of bottom bracket to top/middle of saddle.

#### *Evaluation:*

- Did the salesperson identify the customer's problem? What was it?
- Did the salesperson tell the customer the plan? Did the customer agree with the plan?
- Did the salesperson use the fit kiosk to determine bike size and initial saddle height? If no, why not?
- If applicable, did the salesperson use the fit bike to confirm saddle height and compare bike sizes if needed? If no, why not?



## Guide Sales Process

### Coshop

#### *Key points:*

- Coshopping is when you as the salesperson are shopping alongside a customer to guide them to the products they need.
- The key to coshopping is to use the dots you collected while qualifying to connect the customer to the products that will solve their problem(s).
- The point of this step is to connect dots. Make sure to clearly point out why you are showing a product and get concurrence. (e.g. You mentioned before that you especially have trouble keeping up on hills on your group ride. I think the Emonda is a great fit for you because it is super lightweight and designed specifically to go uphill fast. How does that sound?)

#### *Practice:*

- Provide context, goals, research, and concerns for a hypothetical customer. Connect these dots first to a family of bikes, then to a specific model. Be sure to clearly state the connection between information you've gathered from the customer and the product you are recommending. Ask additional questions if you realize you don't have enough information to suggest a specific model.

#### *Evaluation:*

- Did the salesperson start with a broad overview of bikes in the category, recommend a family, and get concurrence from the customer?
- Did the salesperson recommend a model by connecting dots between the customer's needs and the specific model? What are some examples?
- Did the salesperson point out any features/benefits without connecting them to customer dots? What are some examples?



## Guide Sales Process

### Test Ride

#### *Key points:*

- Prep the bike for the test ride:
  - Inflate tires and explain to the customer how to do this
  - Check braking and shifting
  - Attach daytime running lights
- Prep the rider for the test ride:
  - Provide a helmet
  - Teach braking and shifting
  - Discuss three things to try on the test ride (based on the dots you have collected)

#### *Practice:*

- Employees pair up and practice prepping each other for a test ride. Each employee should pick a persona for this exercise. Select a bike and inflate tires, check brakes, check shifting, and install daytime running lights. Teach the test rider how to brake and shift, fit them for a helmet, and discuss three things to try on the test ride.
- Every employee rides your test ride route 3 times
  - On an FX or DS
  - On a road bike
  - On a mountain bike
  - Discuss: What are some potential things we might recommend customers pay attention to on the test ride? Workshop ideas for each bike type and different customer profiles.
    - Example: How should we direct a Dual Sport 3 test ride for a customer who is riding for exercise and exploration on rail trails?

#### *Evaluation:*

- Did the salesperson prepare the customer for the test ride? (teach braking, teach shifting, set up with a helmet, set up with daytime running lights)
- Did the salesperson prepare the bike for the test ride? (check brakes and shifting, inflate tires)
- Did the salesperson recommend a test ride route?
- Did the salesperson instruct the customer on what to do and pay attention to during the test ride? What are some examples?
- Was the salesperson there to greet the customer when they returned from their test ride?
- Did the salesperson ask follow-up questions regarding the things they asked the customer to pay attention to on the test ride?



## Guide Sales Process

### Address Objections

#### *Key points:*

- A test ride will often bring out some objections or additional concerns. This is actually AWESOME because it allows us to solve more problems for our customer. We have solutions to most objections.
- Here are some common objections and solutions:
  - Comfort (saddle, hands, etc.) – suggest cycling shorts, a different saddle, cycling gloves, a bike fit
  - Price – discuss Trek Card and calculate monthly payment
  - Wrong bike – go back to qualifying. Ask more questions to determine what the right bike is.

#### *Practice:*

- Take turns practicing responding to some of the most common objections you hear. Comfort, price, and the wrong bike should all be included, but add in any others that you often get.
- Practice using an objection to transition into customizing:
  - Example: The customer found the saddle to be uncomfortable. The salesperson could reply “Saddles can be very personal, and a great thing here at Trek is that we customize the bike exactly for you. How about we look at some different saddle options? And we should also talk about cycling shorts.”
- Role play a scenario when the objections aren’t easily converted into a sale. Practice asking for customer info and writing a quote.

#### *Evaluation:*

- Did the customer have any objections or concerns? What are some examples?
- How did the salesperson address the concerns?
- Did the salesperson transition smoothly to a quote if the customer did not want to make a purchase today?



## Guide Sales Process

### Customize

#### *Key points:*

- A new bike must be customized for the unique needs of each rider. You should know these needs by now from qualifying, coshopping, and addressing objections.
- The goal of this step is to set the customer up with everything they need to have an incredible ride. Make sure that you connect each item to something you have learned about the customer.

#### *Practice:*

- Dream ride game (see Trek University Sales Drills for instructions)
- Provide context, goals, research, and concerns along with any other relevant information about a customer and their ride. Practice customizing their experience.
  - Practice delivering a quick value proposition that connects dots for each product.
  - Pay attention to the flow from one product to the next. Is product adjacency smooth? Are the right products on display? If not, should we change the flow in our process or work with our VPS or buyer to change adjacency or inventory?

#### *Evaluation:*

- Did the salesperson use dots they collected about the customer to recommend accessories needed to appropriately customize their bike and improve their ride experience?
- Did the salesperson verbally connect the dots so that the customer understood each product recommendation? What are some examples?
- What would you have done differently?



## Guide Sales Process

### Delivery and Follow-Up

#### *Key points:*

- Ask for email address when checking them out. We use this to communicate special store events, but more importantly, they'll get some coupons and other post-purchase offers.
- Discuss regular maintenance and introduce the customer to your service team.
- Teach how to shift, how to inflate tires, and how to remove front wheel.
- Invite the customer back for a shop ride, clinic, or other event that is relevant to them.
- Walk the bike or the product out to the car with the customer.
- This is our last point of contact in the store with any given customer. Make sure to leave them with a great impression!
- Once the customer is happily on their way, transfer any notes to Ascend, and develop a plan to follow-up with the customer.

#### *Practice:*

- Practice asking for email.
- Practice introducing a customer to the service team.
- Practice teaching how to shift, how to remove the front wheel, and how to inflate tires.
  - FX/DS
  - Road bike
  - Mountain bike
- Practice writing a follow-up plan.

#### *Evaluation:*

- Did the salesperson introduce the customer to the service team and set the expectation of future service needs?
- Did the salesperson offer/suggest any local rides or events?
- Did the salesperson enter the customer into the POS? Did they get the customer's email address?
- Did the salesperson set the expectation for follow-up or invite the customer to visit the store again?
- Did the salesperson offer to help get the product to the customer's car?
- What is the salesperson's plan for following up with the customer? How will they ensure that they execute the plan?