

SKILL SHEET

VISIT PLANNING SHEET



The Visit Planning Sheet is a more modern version of the traditional Guest Sheet. The psychology behind the updated sheet is to create a sense of participation in the planning process for the customer. Our willingness to let them participate in the planning process will lead to an increased sense of control in their eyes. When they feel more in control then they will feel more comfortable. When a customer is comfortable, they make buying decisions. This is also a great competitive advantage for us as it pertains to creating and delivering a better customer experience. Your competition is not doing this.

Planning Word Track

“ _____ (customer name), these are the steps that it takes to complete a purchase, and this is the traditional order in which they go in.”

“If you are wanting the process to go as fast as possible then this is the order that we would recommend.”

“However, we want you to be comfortable with every step of the process so if there are any of these steps that you would like to do in a different order, we are completely fine with that.”

“We want you to have the best experience possible.”

“Do you want to stay with the traditional order, or do you prefer to move any of the steps around?”

If they do ask to move anything around, do not act upset or disappointed but do point out the disclaimer under the steps that says **customizations in step order may result in additional time required to complete transaction.*

Optional Meet and Greet Word Track

“Good afternoon (time appropriate greeting) and welcome to Shottenkirk _____.”

“Are you here for sales or service today?” (they say **sales**)

“Fantastic, I would love to help you. My name is _____ and you are?”

“It’s very nice to meet you _____. Are you here for the traditional process or the Shottenkirk Your Way process?” (they will say **what’s that**)

“That’s our way of letting you plan your own visit today. We sit down and you tell us what you want to do and in what order you want to do them and then that’s what we do.”

“Does that sound good to you? (they will more than likely say **yes**)

Great, please follow me.”