

# SKILL SHEET

## PROSPECTING - HAPPY BIRTHDAY

Many customers choose to make a new automotive purchase as a reward to themselves either just before or right after their birthday. Nothing says happy birthday to me quite like a brand new or “new to you” pre-owned vehicle. We want to make sure that we remain focused on capitalizing on this opportunity.



### Action Points:

- All birthday calls should be set up to show as a scheduled task in the CRM
- Call should be set up to show as a task 30 days prior to the actual birthday

### Option 1: Non-Incentivized

*“Good morning/afternoon/evening, could I please speak to Mr./Mrs. \_\_\_\_\_?”*

*“Hello Mr./Mrs. \_\_\_\_\_, this is \_\_\_\_\_ (your name) from Shottenkirk \_\_\_\_\_ (dealership).”*

*“I saw that your birthday is coming up soon, and I was just calling to wish you a happy **EARLY** birthday.”*

***(Insert OPTIONAL birthday gift word track from below if your store wants to offer)***

*“We have many customers that like to create a lasting birthday memory by rewarding themselves with a vehicle upgrade for their special day. **Have you ever done this?**”*

*If YES – “Fantastic, are you ready to do it again this year?” If NO – “Great, so this could be the year?”*

*If they show **ANY** interest, then continue the conversation all the way to asking for the appointment.*

*If they show **NO** interest:*

- *“I understand and thank you for your time and for taking my call.”*
- *“Would you at least allow me to send you a birthday upgrade proposal just for you to see?”*
- *“Great, is this still the best email address to send it to (verify email on file)?”*
- *“I’ll get working on that proposal right now and once again, happy **EARLY** birthday.”*

### Birthday Gift Offering (plug-in)

*“I also wanted to call and make sure that you knew about our special **\$500 Shottenkirk birthday gift**. Do you know what this is?” They will say no.*

*“Oh, I’m **really** glad I called then. Our birthday gift to you is a **\$500 credit** towards (see management to see what they want you to say) that is good for **30 days before** through the **30 days after** your birthday.”*

### Focus Points:



This call will only be effective if you are communicating in a way that shows that you are GENUINELY wishing them a happy birthday. If you sound robotic or boring, or that you really don’t care about their birthday, it will not work. This call should be exciting and have a very positive energy flow to it. Remember that you are calling to wish them a HAPPY EARLY BIRTHDAY and they should feel like a valued person and not just a valued prospect. Engage with them!