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# Increase Employee Performance: Step by Step to 30%+



Glenn Pasch

*CEO*

PCG Companies

Eatontown NJ

732 450 8200

[glenn@pcgmailer.com](mailto:glenn@pcgmailer.com)

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#### **A Note from the Presenter:**

**I want to thank you for attending my session. I hope this information brings value to your organization. I have enclosed the 8 step coaching process as well as some training forms that have helped my clients and myself track their training.**

**Remember training a team for success takes time and effort. It will be well worth your effort as you see you team grow, execute at a higher level and able to be more efficient with your marketing and training investments. Here is a great quote from Ryan Kalil, center for the Carolina Panthers when asked about his coach Ron Rivera.**

***“A lot of people look for immediate success,” says center Ryan Kalil. “They don’t get it, and they move on and fire people and they reset. This is an organization that believes in its process and stays with its process and allowed Coach to stay the course and keep building on his foundation. Building a solid team takes time. It’s unfortunate what you see around the league, after a couple seasons, teams reset when they have some tough games and even if they love the coach they fire him anyway. That’s terrible. Our team doesn’t easily get influenced by the outside, which is tough in this day and age. I am proud of that fact that we’re stoic in that regard and do a good job in that and trust in their process.”***

**When you think about your business or dealership, are you more like the Panthers or the rest of the league.**

**I wish you success and happy training!!!**

**Glenn**

**Self Assessment:**

**Reasons why you return to businesses and why you do not:**

**Have you ever interviewed a trainer?**

**List top qualities of trainers you encountered:**

**How would you rate your training documentation process:**

**How would you rate your follow up process:**

**What is the one thing you will review/change when you return:**

## **The Coaching Process: How To Make Change Stick**

If someone came into your dealership today and asked you to write out the process you currently follow for training an Internet sales representative, how many steps would there be? What would those steps look like?

How many times have you thought you had taught someone to do something correctly only to get different results than you expected? To solve this problem, we will present our 8-Step Coaching Process to use when training employees on specific tasks.

### **The 8-Step Coaching Process**

1. Explain what needs to happen
2. Explain why it is important to learn this skill
3. Explain the steps that will happen
4. Demonstrate what needs to happen so they watch you
5. Watch them do the task
6. Give feedback
7. Have them repeat back the steps they did to anchor in the behavior
8. Follow up the next day

Let's take a look at the training process in detail so that you can understand the benefits of doing all eight steps.

### ***Step 1: Explain what needs to happen***

Explaining the journey to someone will help them understand all the information that follows. In this opening section, there is no reason to go into too much detail. Just explain what you are trying to accomplish. For example: “We are going to implement new CRM codes for tracking our leads.”

### ***Step 2: Explain why it is important to learn this skill***

Understanding *why* something has to happen will help to reinforce training. Just doing something because you are told to do something does not give the learner a stake into accomplishing the task. Understanding how others may be relying on their execution helps keep the employee focused.

### ***Step 3: Explain the steps that will happen***

Knowing all of the steps that will happen allows the learner to comfortably focus on the task at hand because he/she knows what is coming next. If you skip this step the learner will ask a host of basic questions, many of which could have been answered earlier. This will derail progress.

### ***Step 4: Demonstrate what needs to happen***

Inexperienced managers make the mistake of telling their employees what needs to be done or explaining how to do it, but they leave out a very important step: demonstration.

Demonstrating clarifies each aspect of the task and how you want it done. Questions can be asked and answered, so there is no confusion. This stops future instances where the learner would say, “Oh, I thought you meant...”

Take the time to walk your employees through the step, making sure they are watching what you are doing so they can replicate behavior. Without demonstration you leave a lot of room for interpretation and the possibility of feeling frustration when you are not getting the results you need.

### ***Step 5: Watch them do the task***

This step allows the trainee to practice what was demonstrated. Don't assume they are able to perform what you just demonstrated. One of the big mistakes for managers is just saying, “You got this, right?” What new person will risk a manager's disapproval by telling them that they need them

to repeat the training? Make them do the task. If it involves a live interaction where it can impact business, you may want to role-play with them.

***Step 6: Give feedback***

This step allows both parties the opportunity to make adjustments. Make sure that you see your employees doing the task correctly a few times before you send them off on their own.

***Step 7: Have them repeat the steps***

This step is often overlooked. Make sure they understand what they did and how the steps fit together. They may just have a good memory and can mimic what you did, but getting them to understand the process and repeat it back anchors it in for the future.

***Step 8: Follow up the next day***

I cannot stress following up enough. Follow up on all new behaviors. Do not stop inspecting. What you will do is gradually wean off checking your employees' work as they improve.

## Getting Results and Accountability

In the previous section we discussed The 8-Step Coaching Process and how to train your team effectively. What we now need to address is what happens when you follow up and monitor results, what to do when you achieve the desired results, and what to do when you do NOT achieve the desired results.

### What To Do When You Achieve Results

This is one of the common faults of inexperienced managers. We tend to get so focused on when we do not get results that we do not review how we achieved the results we wanted. When results are attained, take the time to review with your team *what* they did to achieve the results.

Review the behavior and actions your team performed so that they will anchor those in and repeat them in the future. Remember to congratulate them on their success. We repeat behaviors that make us feel good, so make them feel good.

**Example:** Your team is contacting all leads with a call within an hour of submission.

Tell the team that you have inspected their work and that the goal we set was to contact our leads with a personal call within one hour of submission. You inspected 25 leads this week and everyone was able to do it.

First, tell them how proud you are that they are adapting to change. Make sure to ask them what change in their personal actions accomplished this goal. Then take time to explain what you expect moving forward.

Lastly, make sure to reinforce how this will lead to more customers coming in and more success for all of the team.

### **When You Do Not Achieve Your Desired Results.**

When you follow up and you see that you have fallen short of your goals, you need to take stock of what happened without any emotional attachment. Review with your team *what* they did, so that you can compare it to what was the expected behavior. Remember focus on specific actions.

**Example:** Your team is not contacting all leads with a call within an hour of submission.

Tell the team that you have inspected their work and that the goal we set was to contact our leads with a personal call within one hour of submission. You inspected 25 leads this week and, as a team, it was only done 75% of the time.

First, ask them to tell you what stopped them from making the calls. Then remind them of the behavior you put in place to accomplish this. Discuss how to overcome these obstacles and then remind them what you expect moving forward.

Do not reprimand them by saying they failed because they are doing it 75% of the time. Find out if the 25% was due to one person or a fault in the process or in the training.

Now you have to dig in asking the following questions:

#### **Was this person/team trained correctly to perform these tasks?**

Many times results are not achieved because initial training was rushed or, even worse, it was assumed that the people should know what to do. If you answered “no” to the above question, go back to the 8-Step Coaching Process and train your team correctly.

If you answered, “yes” to the above question, meaning you feel they were trained, you have to ask them the following question so that you can focus your next step of training on the exact root issue.

#### ***What do you remember from your training on how these tasks were to be performed?***

The answer to this question will fall into three different categories:

1. **They do not remember what to do.** In this case you will need to go back to the basics and retrain them as if they were never trained.
2. **They remember part of what they should do.** In this situation you can anchor in what they did correctly and retrain them on the specific areas where they need to improve.
3. **They know what to do but did not do it.** In this situation you will have to see if this is an ongoing problem (we will discuss this in a minute) or is there another reason that affected performance. Maybe there is something going on in their personal life that is affecting their work. Then your training can focus on that versus reviewing what they should be doing.

Do not forget to ask this question. It will help you keep your team's attention on their needs versus just repeating what they need to do. This step makes you a much more effective teacher and trainer.

### **Employees Who Are Not Willing to Change**

There may be an occasion where you have retrained someone and they still do not get results. This is where you need to use your skills as a manager to see if they are working hard to improve or are they just not caring. If it is the former, you may give them an additional training session. You must be clear that they have to execute in the future or their employment will be in question.

In the second case, it may be time to sit down in a more formal meeting and address the person's performance in terms of a documented review. Make sure you have someone with you and that you are clear about what you expect, what has been happening, and what needs to change.

Remember to let the individual know the consequences if he/she does not improve. When this person leaves the meeting it has to be clear what they have to do as well as having signed the document, in case you have to terminate their employment.

If you have hired correctly and followed the Coaching Process, this last instance should happen very rarely. Most of your team will improve because you are following up, anchoring in the correct behavior, and focusing your training on specific needs versus a one style fits all situation.

Remember that getting results takes constant follow-up and feedback. Finally, this 8-Step Coaching Process will improve the long-term production of your team, as well as making it easy for management to follow up on each person's progress.

Starting with an objective and then being specific with your training will lead to a successful team and organization.

It is imperative that you stick to your plan and work through each of the peaks and valleys. Do not lose focus when you see progress nor when you do not. This is a change in culture where opportunities are now met with strategy and planning as well as execution and follow-up.

### **How to use the following forms:**

**Employee Performance Area:** This could be used to check the processes through the customer journey in your store. Check if you have documentation, training process, follow up process that meets your satisfaction. If you find areas to improve, document and assign someone to remedy the situation.

**Employee Coaching Form:** Used for training on any aspect of their job. Remember to point out what they are doing well to anchor in that behavior, as well as documenting a date for follow-up.

**Sales Calls and CRM Review Form:** This is for specific training on these skills. I recommend doing these weekly to help improve performance and efficiency of your team.

**Sales Check-in and Check-out:** The manager of sales or service teams uses this form when their members deal with customers directly. Each morning the manager will review the plan of action of each member for that day. What calls, emails, appointments and any other tasks that need to occur that day. Before the employee leaves they check out with the manager to make sure all of the work is completed and documented in the CRM

## **Employee Performance Areas**

1. First Point of Contact
  - a. Email
  - b. Phone
  - c. Walk-in
2. Check In Process
  - a. Appointment
  - b. Walk-in
3. Staffing of Floor
4. Road to Sale Process/Training
5. Lead Follow Up Process
6. Manager Training
  - a. Check in/Check Out
  - b. Training Forms

**Areas Inspected**

**Areas for Improvement**

**People Responsible for Improvement/Training**

**Date for Follow up:**

# Employee Coaching Form

**TOPIC:**

**Areas of Success:**

**Areas for Improvement:**

**Date for Follow up:**

**Employee Sign-off**

I understand the coaching scores and notes, which are designed to improve my sales success here at the dealership. I commit to work on improving my compliance with recommended procedures.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Coach \_\_\_\_\_

**Sales Call Review** (Listen to at least 3 call recording) \_\_\_Inbound\_\_\_Outbound

Rating System:                   “0” Never                   “1” Sometimes                   “2” Always

| Did The Employee:   | M | T | W | TH | F | S | S |
|---|---|---|---|----|---|---|---|
| Perform the greeting and opening correctly.                         |   |   |   |    |   |   |   |
| Identified themselves and Dealership correctly.                     |   |   |   |    |   |   |   |
| Performed their presentation correctly                              |   |   |   |    |   |   |   |
| Customer questions were answered clearly and promptly.              |   |   |   |    |   |   |   |
| Handled and overcame objections appropriately.                      |   |   |   |    |   |   |   |
| Customer was asked to schedule an appointment in the showroom       |   |   |   |    |   |   |   |
| Provided their own contact information                              |   |   |   |    |   |   |   |
| If appointment was not scheduled was a follow up call setup?        |   |   |   |    |   |   |   |
| Contact information requested, collected, and entered into the CRM. |   |   |   |    |   |   |   |
| Detailed notes of call were logged into the CRM                     |   |   |   |    |   |   |   |
| Total Score   |   |   |   |    |   |   |   |

**Average Score:** \_\_\_\_\_

**Areas of Success:** \_\_\_\_\_

**Areas for Improvement:** \_\_\_\_\_

**Date for Follow up:** \_\_\_\_\_

**Employee Sign-off**

I understand the coaching scores and notes, which are designed to improve my sales success here at the dealership. I commit to work on improving my compliance with recommended procedures.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Coach: \_\_\_\_\_

**Content Review:** (Review three active leads & review communication history)

Rating System:                    “0” Never                    “1” Sometimes                    “2” Always

| Did The Employee:   | M | T | W | TH | F | S | S |
|---|---|---|---|----|---|---|---|
| Email correct response in a timely manner (i.e. <15 minutes)        |   |   |   |    |   |   |   |
| Answered the question(s) of the consumer correctly?                 |   |   |   |    |   |   |   |
| Provided proper links to information if needed.                     |   |   |   |    |   |   |   |
| Correct calls to action given for the customer to re-contact dealer |   |   |   |    |   |   |   |
| Email communications suggested alternative set of vehicles          |   |   |   |    |   |   |   |
| Email communication shows proper use of pre-formatted templates.    |   |   |   |    |   |   |   |
| Employee used video or text to communicate (if applicable)          |   |   |   |    |   |   |   |
| Did email contain employee’s correct contact information            |   |   |   |    |   |   |   |
| Communication notes were updated in CRM as needed                   |   |   |   |    |   |   |   |
| Follow up tasks were scheduled properly                             |   |   |   |    |   |   |   |
| Total Score   |   |   |   |    |   |   |   |

**Average Score:**

**Areas of Success:** \_\_\_\_\_

**Areas for Improvement:** \_\_\_\_\_

**Date for Follow up:** \_\_\_\_\_

**Employee Sign-off**

I understand the coaching scores and notes, which are designed to improve my sales success here at the dealership. I commit to work on improving my compliance with recommended procedures.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Coach \_\_\_\_\_

**Sales Staff Check-in and Check-out:**

**Date**

| Name | Check<br>in | Check<br>Out | Notes |
|------|-------------|--------------|-------|
|      |             |              |       |
|      |             |              |       |
|      |             |              |       |
|      |             |              |       |
|      |             |              |       |
|      |             |              |       |
|      |             |              |       |

Notes: