Business Operations Systems and Strategies – BOSS

Courses included in the BOSS product on Wheelhouse College – www.wheelhouse.college

Hiring Staff: Train and Hire Strategy, Level 1

Description: This course details the implementation of the "Train and Hire" process to successfully recruit and hire new front-line staff for all dealership departments. Learn about the proven advantages of the Train and Hire model as we provide in-depth details about how to run a 3-day hiring event. In level 1 of this mini-series, we will guide you the placement of a recruitment ad through all of the following steps up to the schedule and activities for the second day of a hiring event. The course includes training modules to provide to the candidate attendees.

Lessons:

1. About the Train and Hire Strategy
2. Introduction to the Train and Hire Strategy
3. Placing the Ad
4. Logistics and Who Should Be There
5. Night 1: Agenda and Steps
6. Night 2: Agenda
7. Night 2: What Are They Buying (The Human Brain, Part 1)
8. Night 2: Uncomfortable Question Sheet
9. Night 2: Who's Coming Through the Door
10. Night 2: GREET and FORMAT, the Importance of Step 1
11. Night 2: Recap

Hiring Staff: Train and Hire Strategy, Level 2

Description: Level 2 of the Hiring Staff mini-series continues where Level 1 left off: the schedule for day 3 of a Train and Hire event. The course covers best practices for training the candidate-trainer in how to present the first four steps of the sales process – a crucial component of new hire learning – and details the final stage of hiring in the candidate selection process. The series concludes with a discussion about the critical role onboarding plays in your success when adding new employees to your team.

Lessons:

1. Night 3: Agenda
2. Night 3: The Human Brain, Part 2
3. Night 3: Step 1--the Greet (Having a System)
4. Night 3: Step 2--Probe or Guided Discovery

5. Night 3: Step 3--Sit In/On
6. Night 3: Step 4--Presentation and FABs
7. Night 3: Selections and Onboarding
8. Night 3: Recap
9. Train and Hire Strategy Summary

How to Hire Managers and Key Personnel, Level 1

Description: Recruiting, interviewing, and hiring key personnel can be a daunting task. This course introduces the first steps of a practice-proven, non-traditional, team-based approach to hiring key personnel that will significantly increase an organization's ability to hire exceptional people. The process focuses on identifying candidates whose values and goals align with those of the organization to ensure mutual satisfaction and set a strong foundation for a long and productive relationship. The "Hiring Funnel" - described in detail and with practical examples - is the key to finding and hiring your next awesome new employee.

Lessons:

1. Hiring Key Personnel Strategy Introduction
2. The Need for a New Approach
3. The Why and the Commitment
4. The Job Posting
5. Follow-up Questions and Invite to Apply
6. Phone Screening
7. Dealership Tour, HR Assessment, and Review

How to Hire Managers and Key Personnel, Level 2

Description: Level 2 of How to Hire Managers and Key Personnel guides you through the second half of the Hiring Funnel. The course covers scheduling and conducting interviews, an objective approach to assessing candidates, and the essential components of the hiring phase – the employment offer, negotiation, and onboarding. The trainers provide practical tips and examples for how to conduct each step through role-playing real-world scenarios.

Lessons:

1. Scheduling and Conducting the Interviews
2. Interview Role-Play
3. Roundtable Discussions
4. Roundtable Role-Play
5. Career Planning with the Applicant

6. Career Planning Role-Play
7. Reference Calls and Hiring Decisions
8. Crafting the Final Offer
9. Negotiation and Onboarding
10. Hiring Key Personnel Strategy Summary

All Departments Introduction to Onboarding

Description: The Introduction to Onboarding course is designed for all department managers and covers critical systems and strategies for the effective onboarding of new employees. The course covers the crucial nature of selling the customer experience, establishing a continuous training culture, integrating departments to prevent silos, and setting clear expectations. The implementation of consistent evaluation methods to measure and improve new hire performance is emphasized.

Lessons:

1. Why is Onboarding Important?
2. What's for Sale?
3. A Culture of Training
4. Silos and Accountability
5. New Hire Evaluation and Review

F&I Department Onboarding

Description: This course provides guidance to leadership teams in creating a four-week onboarding program to cultivate adept F&I managers and staff. You will learn about important tools for assessing the progress of new hires, the essential first-week orientation phase, and recommendations for sales process training specific to the F&I department, which includes topics such as the psychology of selling, and training in menu selling. Emphasis is placed on training new hires on legal compliance matters. The course also covers how to configure practice sessions that reinforce important skills to prepare new hires for real-world customer interactions.

Lessons:

1. F&I Department Onboarding Scorecard
2. F&I Department Week 1
3. F&I Department Week 2
4. F&I Department Week 3

5. F&I Department Week 4
6. Role-Play: F&I Menu Selling
7. Role-Play: F&I Cash Buyer
8. Role-Play: F&I 1 Technique
9. 30-day Performance Review

PG&A Department Onboarding

Description: The PG&A Onboarding course provides managers with a system for onboarding new hires over the first four weeks on the job, preparing them for effective contribution to the PG&A team. You will learn about important tools for assessing the progress of new hires, and how to develop an onboarding program to effectively orient new hires in your organization, introduce key product knowledge, train on fundamentals of the sales process specific to the PG&A department, best-practices for handling phone and Internet inquiries, and addressing complex customer requests. The curriculum highlights the importance of training your new hires in upselling and adding-on, understanding inventory management, and, most of all, creating exceptional customer experiences through proactive engagement and personalized service.
Lessons:

1. PG&A Department Onboarding Scorecard
2. PG&A Department Week 1
3. PG&A Department Week 2
4. PG&A Department Week 3
5. PG&A Department Week 4
6. Role-Play: Answering the Phone in PG&A
7. Role-Play: Upselling and Adding-On in PG&A
8. 30-day Performance Review

Sales Department Onboarding

Description: The Sales Department Onboarding course provides sales managers with an onboarding system that will prepare new hires to effectively contribute to the team. You will learn to develop a comprehensive four-week onboarding program that includes tools for effective evaluation of new team members using an onboarding scorecard. Key topics in onboarding training include store orientation focused on introducing the systems and processes used, sales process training, using the CRM, shadowing experienced salespeople, and ensuring that new employees learn effective customer communication and follow-up strategies. Practical role-play videos demonstrate how to handle frequent sales scenarios.

Lessons:

1. Sales Department Onboarding Scorecard
2. Sales Department Week 1
3. Sales Department Week 2
4. Sales Department Week 3
5. Sales Department Week 4
6. Role-Play: Video Phone Call in Sales
7. Role-Play: Answering the Phone in Sales
8. Role-Play: In-Person Greet in Sales
9. Role-Play: Sales Process – Feature Creature
10. 30-day Performance Review

Service Department Onboarding

Description: This course provides managers with a four-week onboarding roadmap for new team members in positions like Service Writer or Service Advisor. Focused on the importance of efficiency in the Service Department, the course provides guidance on developing an onboarding scorecard to evaluate new hires, week-one orientation, sales process training from the Service Department perspective, safety protocols, and departmental systems and tools. Onboarding continues through the rigorous practice of learned skills and shadowing experienced staff, the independent application of newly developed skills, and finally handling customer interactions and technical tasks without supervision. Role-play videos reinforce the practical application of selling techniques and customer service strategies. This course does not include training on the mechanical and technical specifics that should accompany some of your service department positions.

Lessons:

1. Service Department Onboarding Scorecard
2. Service Department Week 1
3. Service Department Week 2
4. Service Department Week 3
5. Service Department Week 4
6. Role-Play: Phone Call – Adding On in Service
7. Role-Play: Answering the Phone in Service
8. Role-Play: In-Person – Adding On in Service
9. Role-Play: In-Person – Inspect & Report in Service
10. 30-day Performance Review

Digital Lead Management

Description: Evolving customer behavior and expectations surrounding digital sales and marketing demand that dealer processes and training evolve by embracing online leads and sales, and understanding key the differences between in-person and digital activities. This course presents a process for transforming digital leads into physical conversion while maintaining a premium sales experience through every customer interaction. Guided by leading industry experts, you will learn about digital lead generation, nurturing, and conversion. The course includes sample documents and tools that will help you to track and analyze your own dealership numbers relating to digital leads and conversion, and suggestions on technologies you can use to advance your dealership from good to better to best-in-industry.
Lessons:

1. Digital Lead Management Introduction
2. Focus of the Course
3. Lead Under Management
4. Digital Opportunities
5. Digital Sales Processes Are Necessary
6. Lead Generation and Capture
7. Follow-Up and Nurture
8. Lead Conversion
9. Digital Traffic Log
10. Is Your Way Working?
11. Lead Opportunity Scorecard
12. Create a Deal Meeting
13. KPI Analysis and Insights
14. Model Store
15. Technology
16. Digital Lead Management Summary

Generations in the Workplace

Description: This course explores the impact diverse generational perspectives and unique generational characteristics on workplace cohesion. Each lesson emphasizes adapting to modern work-place dynamics, which are affected by the perspectives of a multi-generational staff. Through discussion and role-play scenarios, course participants will gain insights into generational traits, communication strategies, and the importance of finding common ground with the people they are managing.

Lessons:

1. Generations in the Workplace Introduction
2. Understanding Unique Qualities
3. Finding Common Ground - Activity
4. Changes in the Workplace
5. Individual Experience at Work – Activity
6. Table of Generations
7. Generational Identifiers – Baby Boomers
8. Generational Identifiers – Gen X
9. Generational Identifiers – Millennials
10. Generational Identifiers – Gen Z
11. Focus on Similarities – Activity
12. Reflection – Activity
13. Motivate Me – Activity
14. Now What?
15. Summary