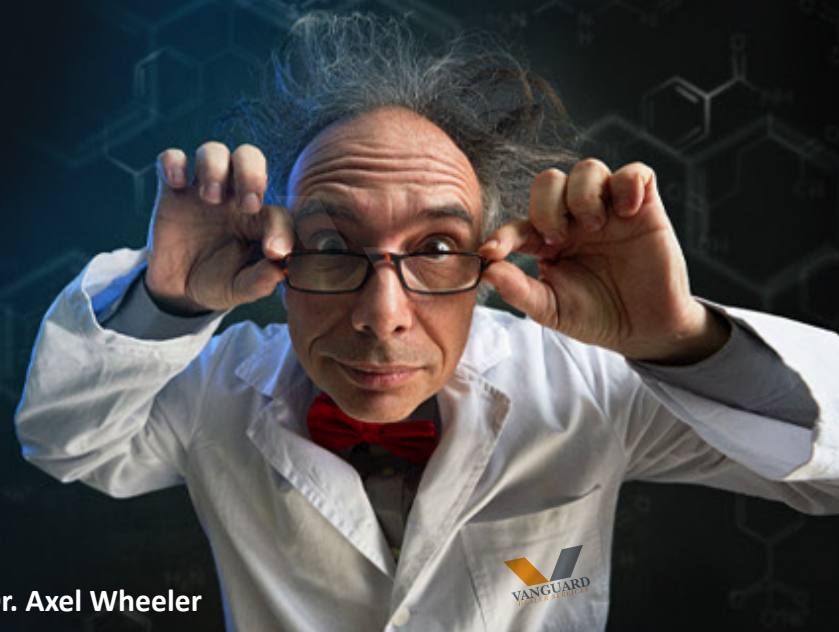


Prescription for F&I Success:

A Dose of Early Involvement

“When, as the F&I Manager, should I be involved in the sales process? It’s very confusing to know when I should insert myself without feeling that I am too early or too late on the path to a sale.

Please help!”



Dr. Axel Wheeler

WOULD YOU RATHER GET AN EARLY TREATABLE OPINION, OR A LATE DIAGNOSIS FROM YOUR DOCTOR?

Time after time, in the top-producing dealerships that the Doctor works with, one thing is clear: the earlier the F&I Manager gets involved in the sale, the more products are sold, and the higher the dealership's income climbs.

So, how can you ensure you're making the most of every opportunity?

Here's your checklist:

- 1 Are you ready, willing, and able to be available when your salespeople need you? Availability is key to closing deals and boosting profits.
- 2 Get out of your office! Practice “Management by Walking Around” the showroom. Your presence on the floor shows you're there to help.
- 3 Stay connected with your salespeople and managers. Regularly check in to see if there are deals in motion.



- 4 Engage early. Make sure the customer knows you're there to assist them, not just with the paperwork, but with creating the best financial solution.
- 5 Don't shy away from questions about interest rates or payments. These questions open doors to finance opportunities!
- 6 Assess the customer's comfort zone. Are they open to chatting on the showroom floor, or would they prefer a more private discussion in your office?
- 7 Start gathering information early. Casual conversations about driving habits can provide valuable insights into which products will best serve their needs.
- 8 Let them see your genuine desire to help. Early involvement gives the customer a chance to experience your friendliness and professionalism.
- 9 Location doesn't matter. Whether you're on the showroom floor or in your office, what counts is making a great first impression and collecting useful information.
- 10 Tailor your product offering to the customer's needs, based on the insights gathered during your early involvement.



Remember, as a manager in your dealership, you not only have the right—but the directive from your owner—to jump into the sales process early and often. It's all about closing deals faster and more profitably.

Sometimes, just an ounce or two of early preventative medicine is all it takes.

