US006125356A

United States Patent [19]

Brockman et al.

[11] **Patent Number:** **6,125,356**

[45] **Date of Patent:** **Sep. 26, 2000**

[54] **PORTABLE SALES PRESENTATION SYSTEM WITH SELECTIVE SCRIPTED SELLER PROMPTS**

[75] Inventors: **Robert T. Brockman**, Houston, Tex.; **Donald D. Jones**, Smiths, Bermuda

[73] Assignee: **Rosefaire Development, Ltd.,** Hamilton, Bermuda

[21] Appl. No.: **08/929,929**

[22] Filed: **Sep. 15, 1997**

Related U.S. Application Data

[63] Continuation-in-part of application No. 08/587,276, Jan. 18, 1996, Pat. No. 5,826,240.

[51] **Int. Cl.^{7}** **G01R 13/00**

[52] **U.S. Cl.** **705/37**; 705/26; 705/39

[58] **Field of Search** 705/37, 7, 26, 705/39

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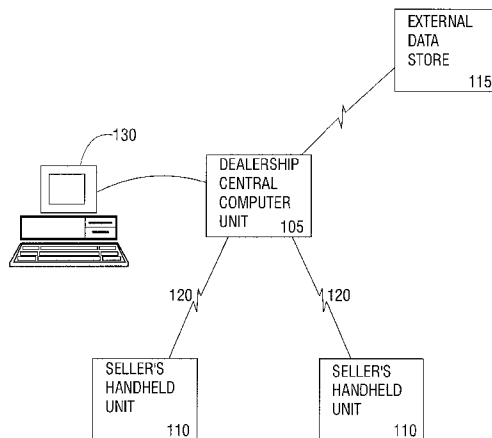
[57] **ABSTRACT**

A handheld computer unit for use by, e.g., a car sales person (seller) prompts the seller with a standard script to be followed at each step in the process after a prospect enters a dealership. The prospect's response to the scripted questions is used to identify the prospect's particular interests of a general nature, e.g., safety, and of a specific nature, e.g., trailer towing capacity. When either a general or specific interest is identified, the seller is prompted to tailor the conversation to address the prospect's interests. Among other things, the handheld unit can perform functions such as (i) permitting the seller to retrieve useful information such as inventory availability from a sales information data store; (ii) displaying option-sensitive prompts to aid the seller in discussing specific vehicles under consideration; (iii) accessing remote communications links to external data sources to obtain information on credit-worthiness of the prospect, financing terms, and availability; (iv) displaying motivational information such as the percentage likelihood of consummating the sale successfully; (v) providing a communications link with management personnel.

47 Claims, 70 Drawing Sheets

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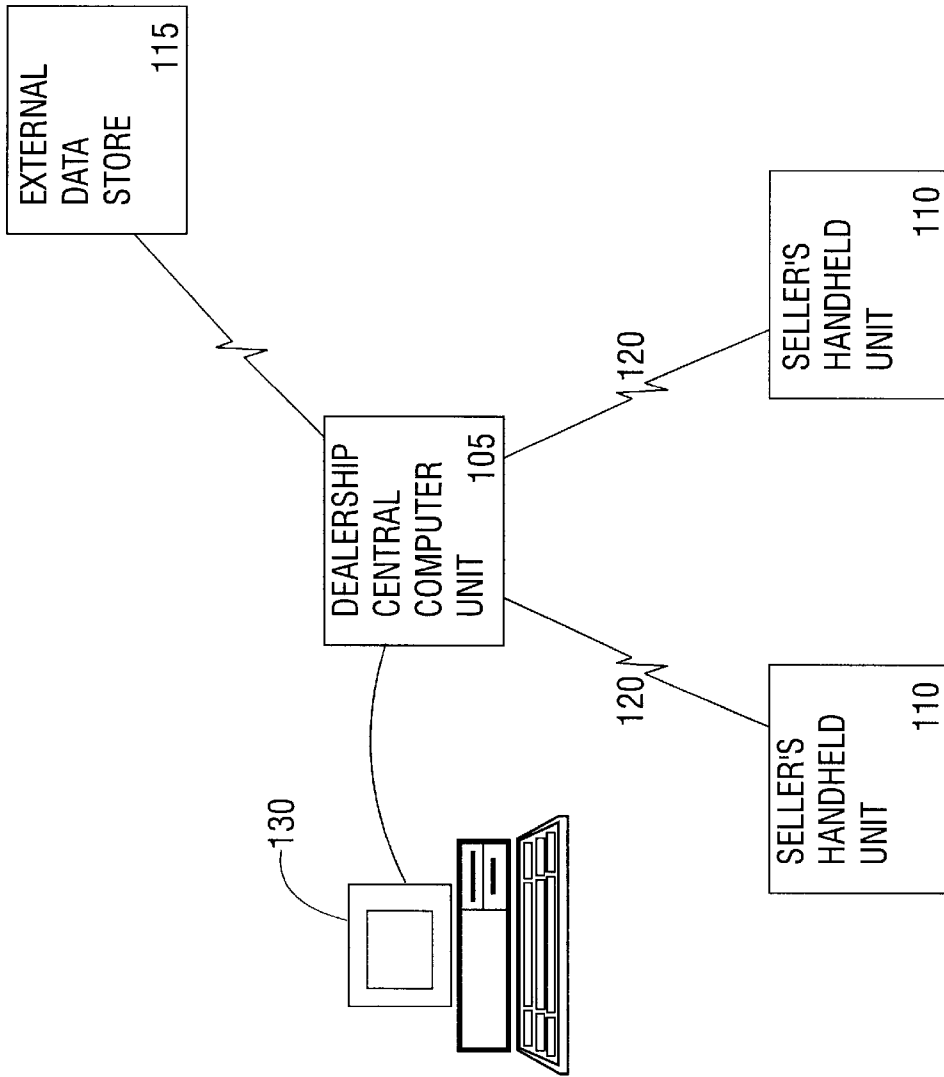"Sound the Alarm" by M. Campanelli, Sales And Marketing Management, no. Part 02, Dec. 94, pp. 20–22, 24/25.

EXTERNAL
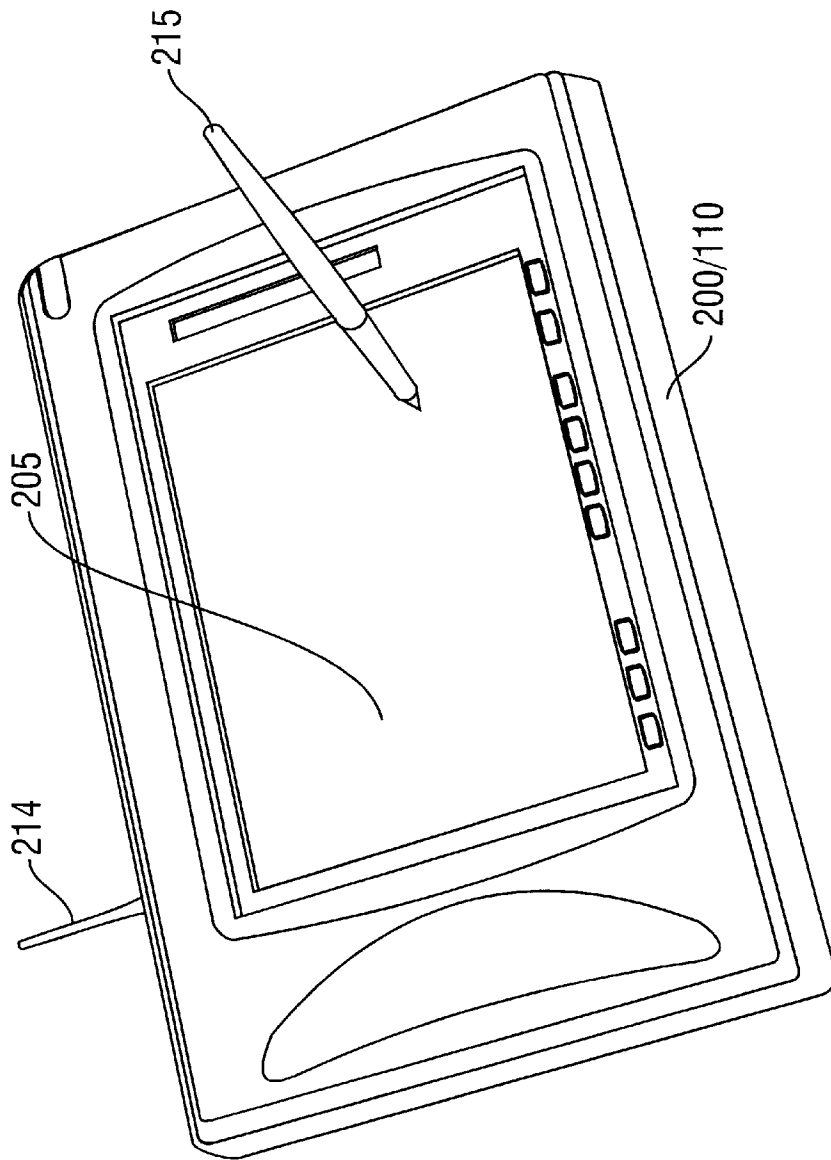DATA
STORE   115

DEALERSHIP
CENTRAL
COMPUTER
UNIT   105

SELLER'S
HANDHELD
UNIT   110

120

SELLER'S
HANDHELD
UNIT   110

120

130

FIG. 1

FIG. 2

Sales Manager   [X]

| Show script | Close prosp | | Manager |

| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |

Name OLSEN,CATHERINE   Title Miss

Address OLSEN,CATHERINE   Company

City MISSOURI CITY   State TX   Zip 77459

County FORT BEND   Country Unite States

Phones   Home (713)660-7385   Work (800)999-6348   Extension 102

          Pager   Cel   Fax (713)827-1200

Employer THE CONTINUUM

Occupation PROGRAMMER

Prospec Type First time   Advertising source SERVC CUST

                                                                                          INF

\Prospect info / Prospect personal data \ Co-buyer data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S/ [◁][▷]

| WAN 0:32 | 4:44 | 412496 Miss Catherine Olsen |

FIG. 3

Sales Manager ⊠

Show script   Close prosp   Manager

*GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL

Name OLSEN,CATHERINE   SSN

Nickname CATHY   Driver lic 102654852   State TX

Age 25-39   Birthday 1/1/1961   Homeowner Yes   Class Woman

Internet address

Spouse name MIKE   Birthday   Spouse SSN

Hobbies BOATING, CAMPING, GARDENING   Referred by

Children MIKEY   10

Trade YES   2A/2N   #PASS

Note WON'T MAKE DECISION WITHOUT SPUSE

PER

Prospect info \ Prospect personal data \ Co-buyer data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S \ ◁ | ▷

WAN 0:32 | 6:53 | 412496 Miss Catherine "Cathy" Olsen

FIG. 4

Sales Manager	[X]

Show script Show script   Manager

*GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL

Name [OLSEN, MIKE]   Title [Mr] SSN [   ]

Address [12334 KIOWA RIVER]

[   ]

City [MISSOURI CITY]   State [TX] Zip [77459]

County [FORT BEND]   Country [United States]

Phones Home [(713)660-7385] Work [   ] Extension [   ]

Employer [   ]

Occupation [   ]

Dirver lic. [   ] State [ ] Birthday [   ]

Prospect info \ Prospect personal data \ Co-buyer data / Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S/ ◁ ▷

WAN 0:32 | 8:04 | 412496 Miss Catherine "Cathy" Olsen

FIG. 5

Sales Manager	☒

Show script	Close prosp									Manager

*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL

New/Used [New]   Low year [1997] High year [1997]   Car/Truck [Car]

Make [FORD]   [   ]   Transmission [   ]   Air cond. [   ]

Series [   ]   [   ]   Engine [   ]   No. of cyl. [   ]

Model # [   ]   [   ]   Fuel type [   ]

Vehicle Type
☐ Car
☐ Sport Utility
☐ Truck
☐ Van

Seating capacity
☐ 2   ☐ 7
☐ 4   ☐ 8
☐ 5   ☐ 12
☐ 6

Body
☐ 2 door
☐ 3 door
☐ 4 door
☐ Convertible

Principal driver [   ]   Age [   ]

Mileage/year [20,000]   Business [   ]

Budget/month [500]   Downpmt [1200]

WANTS 1 [CD]

WANTS 2 [LEATHER]

WANTS 2 [ABS]

Class
☐ Luxury
☐ Sport
☐ Standard

Group
☐ Full size
☐ Mid size
☐ Small

Drive
☐ FWD
☐ RWD
☐ AWD
☐ 4WD

WAN

Prospect info	Prospect personal data	Co-buyes data	Prospect wants	Trade-in	Trade-in appraisal	Vehicle search	S	◁	▷

WAN 0:32	10:31	412496 Miss Catherine "Cathy" Olsen

FIG. 6

Sales Manager											X

Show script | Close prosp | Manager

*GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL

No trade? [ ]   VIN [ ]   Mlg [ ]

Year [1995]   Make [FORD]   Model [TAURUS]

Series [ ]   Body [ ]

Color group [ ]   Color [ ]

Car/Truck [Car]   Transmission [AT]   Engine [6CY]

Condition [GOOD]   Air cond. [ ]

License [TX] [123765]   No. of cyl. [6]

Odometer [67000]   Fuel type [Unleaded]

Balance due [2500] to [FMCC]   ACV [9000]   Gross value [9000]

TRA

Prospect info \ Prospect personal data \ Co-buyes data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S \ ◁ | ▷

WAN 0:32 | 20:55 | 412496 Miss Catherine "Cathy" Olsen

FIG.7

Sales Manager											☒

Show script   Close prosp   Manager

*GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL

Print trade-in appraisal at station [   ]   Print

Verbal request for trade appraisal made to [THOMPSON]

APP

Prospect info \ Prospect personal data \ Co-buyes data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S/ ◁ ▷

WAN 0:32   21:24   412496 Miss Catherine "Cathy" Olsen

FIG. 8

Sales Manager ☒

| Show script | Close prosp | | | | | | | | | Manager |

| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |

Attributes and Price/Payment | Options

New/Used [New]

Low year [1997]

High year [1997]

Make [FORD]

Make [MUSTANG]

Series [ ]

Body [ ]

─Vehicle Type─
☐ Car
☐ Sport Utility
☐ Truck
☐ Van

─Seating capaity─
☐ 2 ☐ 7
☐ 4 ☐ 8
☐ 5 ☐ 12
☐ 6

─Body─
☐ 2 door
☐ 3 door
☐ 4 door
☐ Convertible

─Class─
☐ Luxury
☐ Sport
☐ Standard

─Group─
☐ Full size
☐ Mid size
☐ Small

─Drive─
☐ FWD
☐ RWD
☐ AWD
☐ 4WD

Payment from [500] to [500] Tier [A]

List price from [ ] to [ ]

| Search | Clear screen |

SEL

Prospect info \ Prospect personal data \ Co-buyes data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S/ ◁ | ▷

| WAN 0:32 | 22:33 | 412496 Miss Catherine "Cathy" Olsen |

FIG. 9

Sales Manager [X]

| Show script | Close prosp | | Manager |

| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |

Attributes and Price/Payment | Options

New/Used [New]

Low year [1997]

High year [1997]

Make [FORD]

Make [MUSTANG]

Series [ ]

Body [ ]

Color group [ ]   Color code [ ]   Trim [ ]

Transmission [ ]   Engine [ ]   Quick spec [ ]

Include options

Exclude options

Mileage from [ ] to [ ]

Include statuses [OBDRF]   Include on order [ ]

Days in stock from [ ] to [ ]   Spi# [ ]

| Search | | Clear screen |

SEL

\ Prospect info \ Prospect personal data \ Co-buyes data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S \ ◁ | ▷

| WAN 0:32 | | 22:47 | | 412496 Miss Catherine "Cathy" Olsen |

FIG. 10

Vehicles found

00031456	97 FORD	MUSTANG	2DR CNV		1FALP4443VF201267	R
00031705	97 FORD	MUSTANG	2DR CNV		1FALP4448VF208280	R
CJB00011	97 FORD	MUSTANG	2DR CPE	GT	1FALP42X0VF120241	F
CJB00010	97 FORD	MUSTANG	2DR CPE	GT	1FALP42X4VF116208	F

Vehicle: New 1997 FORD MUSTANG 2DR CNV 3 P44
List: 23590   Calc: 23945   Cost: Calc: 21752   Acct: 100
Mileage: 12   Spi#:   GVW: Whbse: 101.3
Color: RIO RED TINTED CLEARCDAT   Trim: SADDLE CLOTH BUCKETS
Engine: ENGINE-3.8L EFI V6   Trans: AUTO OVERDRIVE TRANSMISSION
Status: (R) READY TO SELL   In stock: 2   Location: FORD SALES
Package: 243A   Options: 572 63A 143 217 132 994 44U M 12H 20A

Select vehicle	More	Cancel

FIG. 11

Sales Manager   [X]

| Show script | Close prosp | | Manager |

| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |

Description | 1997   FORD   MUSTANG   2DR CNV   ED |

Stock number | 00031456 | VIN | 1FALP4443VF201267 |

List | 23945 | Price | 23000 |

| Hold for salesman |

VEH

a \ Co-buyes data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ Selected vehicle \ Credit Bureau Inquiry \ P/ | ◁ | ▷ |

| WAN 0:32 | | 4:44 | | 412496 Miss Catherine Olsen |

FIG. 12

Sales Manager [X]

Show script | Close prosp | Manager

*GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL

Bureau to be inquired: CBI [Yes] TRU [Yes] TRW [No] Auto print [No] Auto flush [No]

Options: CBI: SSN Search [Yes] Phone code [5] Report options [ ]

TRU: Phone code [3] Report options [012]

TRW: SSN Search [No] Phone code [2] Credit phone list [No]

Last [OLSEN] First [CATHERINE] Middle [ ]

Title [ ] SSN [ ] Employer [THE CONTINUUM]

Joint inquiry [No] Spouse's first name [MIKE] SSN [ ]

Current address: Number [12334] Street [KIOWA RIVER]

City [MISSOURI CITY] State [TX] ZIP [77453] Route [ ] Box [ ]

Former address: Number [ ] Street [ ]

City [ ] State [ ] ZIP [ ] Route [ ] Box [ ]

Send

CBI

a \ Co-buyes data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ Selected vehicle \ Credit Bureau Inquiry \ P/ [◁][▷]

WAN 0:32 | 24:00 | 412496 Miss Catherine "Cathy" Olsen

FIG. 13

Sales Manager　　　　　　　　　　　　　　　　　　　　　　　　　　　　　[X]

| Show script | Close prosp |　　　　　　　　　　　　　　　　　　　| Manager |

| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |

Stock number | 00031456 | | 1997　　FORD　　MUSTANG　　　　　2DR CNV　　E8 |

| Customer Offer | Management Offer (display only) |

Customer Offer

[Q] 01-FINANCE　　　[Q] 10-BALLOOM
[Q] 01-LEASE　　　　[Q] 10-CASH

Price | 23000.00 |　　Estimated Trade value | 9000.00 |

Down pmt | 1200.00 |　　Trade payoff | 2500.00 |

Rebate | |

Term | |　　　　Payment | 500.00 |

Submit to Power Workstation # | W3J |

Comment
| |

Management Offer (display only)

✔ 10-BALLOON　　|　✔ 01-LEASE　　|　✔ CASH
　　　　　　　✔ 01-FINANCE

Price | 23000.00 |　　Estimated Trade value | 9000.00 |

Down pmt | 1200.00 |　　Trade payoff | 2500.00 |

Rebate | |

Term | 43 |　　　Payment | |

APR | 10.00 |　　　Balloon | |

Quote has been logged
| Buyer's Order |　　　　　　　| |

Last activity:　Counter-offer received

| Submit offer | | Start over | | Counter-offers |

Comment
| |

OFF

| s \ Trade-in \ Trade-in appraisal \ Vehicle search \ Selected vehicle \ Credit Bureau Inquiry \ Prospect offer \ Sold \ Delivered / | ◁ | ▷ |

| WAN 0:32 | | 27:34 | | 412496 Miss Catherine "Cathy" Olsen |

FIG. 14

16 of 85

Sales Manager	X

Show script | Close prosp | Manager

| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |

Name | OLSEN, CATHERINE

Prospect | 412496

VIN |

Stock |

Drescription |

This unit is sold | Yes

SOL

s \ Trade-in \ Trade-in appraisal \ Vehicle search \ Selected vehicle \ Credit Bureau Inquiry \ Prospect offer \ Sold \ Delivered / ◁ ▷

| WAN 0:36 | 29:29 | 412496 Miss Catherine "Cathy" Olsen |

FIG. 15

Sales Manager   [X]

[Show script] [Close prosp]   [Manager]

| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |

Name   OLSEN, CATHERINE

Prospect   412496

VIN

Stock

Drescription

This unit is delivered

DEL

s \ Trade-in \ Trade-in appraisal \ Vehicle search \ Selected vehicle \ Credit Bureau Inquiry \ Prospect offer \ Sold \ Delivered /   ◁ ▷

[WAN 0:36]   [29:29]   412496 Miss Catherine "Cathy" Olsen

FIG. 16

Select a vehicle position

● Up front

● Under the hood

● Passenger's side

● Interior

● Driver's side

● At the rear

Done   Cancel

FIG. 17

Speed Control			
	Next	Previous	More?

Interior

For relaxed highway cruising, this vehicle has Speed Control with convenient steering wheel-mounted controls.

FIG. 18

Speed Control

| Next | | Previous | | More? |

Interior

This is how it works:
- Press the ON switch and press SET ACCEL at the desired speed.
- To speed up, press and hold SET ACCEL. To slow down, press COAST.
- Touching the brake pedal returns the car to foot control.
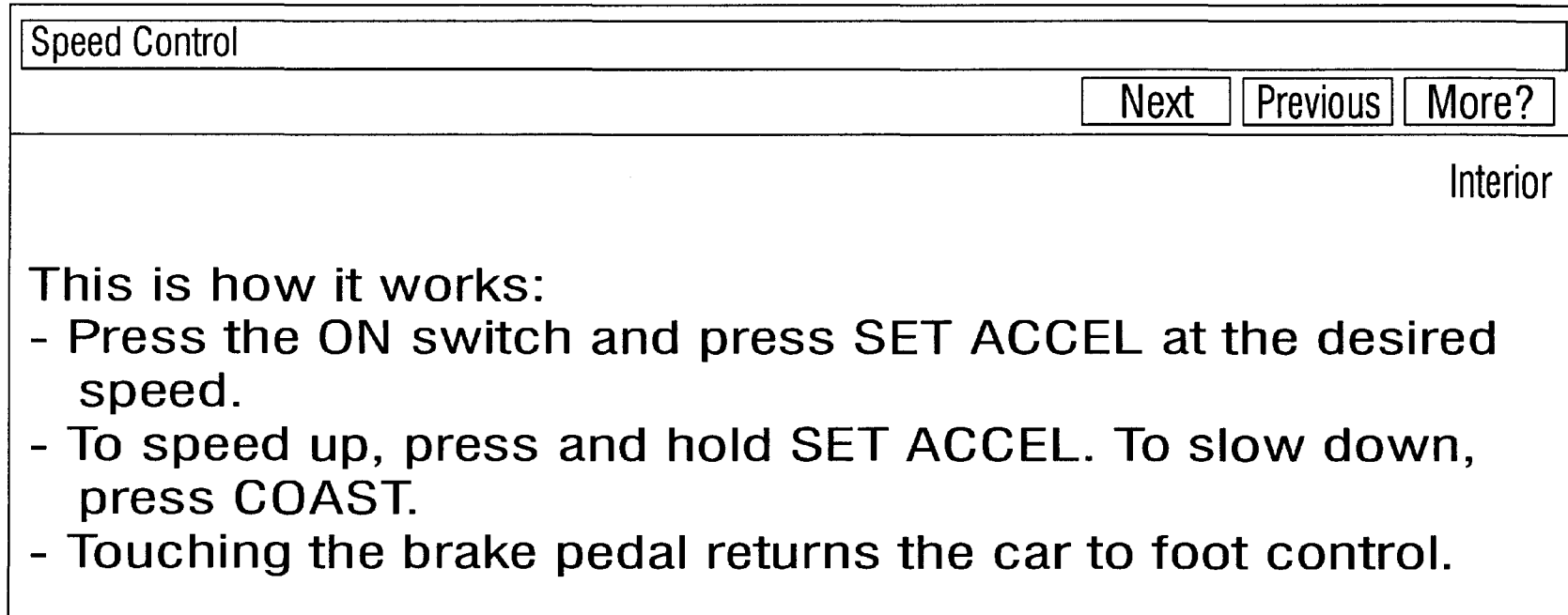
FIG. 19

```
┌─────────────────────────────────────────────────────────────────────┐
│ Sales Manager                                                    [X]  │
│ ┌───────────┐                                          ┌───────────┐  │
│ │Show script│                                          │ Manager   │  │
│ └───────────┘                                          └───────────┘  │
│                                                                       │
│       *Name │OLSEN, CATHERINE              │        ┌──┐              │
│                                                     └──┘              │
│       Phones  Home │(713)660-7385│   Work │(800)999-6348│  Extension │102│ │
│                                                                       │
│   Beback date │        │   Time │    │                               │
│                                                                       │
│   *Tickle date │9/3/1997│  Disposition │                          │  │
│                                                                       │
│  *Prospect type │First time      │   *Advertising source │SERVC CUST      │ │
│                                                                       │
│           *Up  │    │                                                 │
│                                                                       │
│                                                  ┌───────────┐        │
│                                                  │ Main Menu │        │
│   * These are the minimum required fields necessary to close          │
│     the prospect and return to the Main menu.    ┌───────────┐        │
│                                                  │  Cancel   │        │
│                                                  └───────────┘        │
│                                                            BEB        │
│                                                          ◁ ▷          │
│ ┌─────────┐ ┌───────┐ ┌─────────────────────────────────────────┐    │
│ │WAN 0:05 │ │ 38:10 │ │412496 Miss Catherine "Cathy" Olsen       │    │
│ └─────────┘ └───────┘ └─────────────────────────────────────────┘    │
└─────────────────────────────────────────────────────────────────────┘
```

FIG. 20

| | | Top | Previous |

Welcome to ABC Motors, How may i assist you today?

| We need a new car | We're just looking | How much is this car |

FIG. 21

CLNT TST002　　　　　　　　PRINT 415 RECORDS - REPORT 022　　　　　　　RUN 09/10/97 15:35:40　　PAGE: 2

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ
CBI 0010	Let's get you started on the credit application. Fill in all of the lines on both sides of the page. When you are done, you and I will go over it to make sure it is complete.	Continue				CBI 0020
CBI 0020	While you're filling that out, I'll need to see your driver's license and I need your social security number.	Continue				CBI 0030
CBI 0030	Enter Social Security number:	Continue			BUYERSSN	CBI 0040
CBI 0040	Enter Driver's license number:	Continue	TX		DRIVERSLICST DRIVERSLICNO	CBI 0050
CBI 0050	Enter Driver's license state:	Continue			DRIVERSLICST	CBI 0060
CBI 0060	Enter Address. Is it correct on the license?	Continue			BUYERADDR1	CBI 0070
CBI 0070	Enter Zip Code. Is is correct on the license?	Continue			BUYERZIP	CBI 0080
CBI 0080	That'll do it. Let's review the credit application, and then I'll take it to the Business Manager.	Continue				CBI 9999

FIG. 22

CLNT TST002.   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97   15:35:40   PAGE=   3

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ	*
DEL 0010	When the business manager has finished with your customers, you will receive a page asking you to come to his office. Take your customers to your office and complete the delivery process. Review contents of the New Vehicle Packet.	Continue				DEL 0020	
DEL 0020	* Show your customer where the service write-up area is. * Introduce your customer to a Service Advisor. * Give him/her the scheduled maintenance book. * Remind him/her of the three free LOF in the front of the book.	Continue				DEL 0025	
DEL 0025	Before introducing the Service Advisor, say: You will be assigned your own personal service advisor. This means that they get to know your vehicles, and they ensure that you are completely satisfied on every visit.	Continue				DEL 0030	
DEL 0030	Tell the customer how convenient service's hours are: Our Service Department is convenient for both pick-up and drop-off customers. Service is open from 7:30am to 7:30pm, Monday through Friday, and by appointment on Saturday.	Continue				DEL 0040	
DEL 0040	Inspect the vehicle while filling out and reviewing the Ford Quality Commitment Delivery Checklist. Now say: In approximately two to three weeks you will receive a survey like this one from Ford Motor Company. The survey will ask you questions concerning your sales experience at ABC Motors.	Continue				DEL 0050	
DEL 0050	We take pride in our customer satisfaction rating. Your COMPLETE satisfaction is our Number 1 goal. Entrance into Ford's Elite Masters Sales Program and part of my compensation is determined by your rating of "2A", which rates your overall purchase/lease experience,	Continue				DEL 0060	
DEL 0060	and "2N", which rates the overall condition of your vehicle at time of delivery. Do you feel you can rate both those areas as	TEN LESS THAN 10	10 <10	BUYERMISC2 BUYERMISC2		DEL 0070 DEL 0080	

FIG. 23

```
     completely satisfied?
---- ----  --------------------------------------------------------  ------------------- --- ---------- ------------- ---- ---- -
DEL 0070  Turn the Quality Commitment Performance Checklist so they   Continue                                            DEL  0100
          can see it, and say:
          Great, I'll make a note of that.
---- ----  --------------------------------------------------------  ------------------- --- ---------- ------------- ---- ---- -
DEL 0080  What can I do to correct the issue NOW, TODAY?              Continue                                            DEL  0090
          Listen carefully to what your customer has to say.  Take
          notes if necessary so he'll know you are paying attention.
                                                                                          LASTNOTE
---- ----  --------------------------------------------------------  ------------------- --- ---------- ------------- ---- ---- -
DEL 0090  Good responses to issues raised at delivery are:           Continue - Cust OK                                  DEL  0091
          - Let's get the GM, I know he'll want to hear about this.   Talk to GM                                          DEL  0092
```

FIG. 24

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE=   4

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ
	- Let's take it back to service and have them look at it now.	Go to Service				DEL 0093
	- I apologize, I didn't realize you felt this way. What can I do to right this situation? Would it help to speak to the Dealer or the General Manager?	Talk to Dealer				DEL 0094
DEL 0092	Well, if you think of anything more you think I can do to improve your satisfaction, please CALL me.	Continue				DEL 0095
DEL 0092	Let's go find the GM for you right now and we'll get this right for you.	Continue				DEL 0095
DEL 0093	Let's go back to SERVICE right now and we'll get it corrected.	Continue				DEL 0095
DEL 0094	Let's go find the DEALER for you right now and we'll get this right for you.	Continue				DEL 0095
DEL 0095	Well, I'm glad we straightened that out. I have one more question for you....	Continue				DEL 0100
DEL 0100	Will you help me increase my business by giving me just one REFERRAL?	Yes				DEL 0110
		Nobody				DEL 0120
DEL 0110	Enter information in your notes in front of the customer. Thank you, I appreciate this.	Continue				DEL 0125
					LASTNOTE	
DEL 0120	You are going to get a lot of attention in the next few days from your friends, neighbors, and co-workers with your new vehicle. If one of them expresses interest in buying a new vehicle, will you give them my card and recommend they call me? Here's an extra business card.	Continue				DEL 0125
DEL 0125	And if they come in and end up buying a new or used vehicle, I'll give you a $25 coupon for The Macaroni Grill to show my appreciation.	Continue				DEL 0130

FIG. 25

```
DEL 0130  THANK YOU for choosing to buy your vehicle from      Continue                           DEL  0140
          ABC Motors.  I hope this is only the beginning of
          our business relationship.
---- ----  ----------------------------------------------  --------------------  --- ----------  -------------- ---- ---- -
DEL 0140  I'll call you in a few days to see if you have any    Continue                          DEL  0150
          questions about your new vehicle and to see how you
          like your new vehicle.
---- ----  ----------------------------------------------  --------------------  --- ----------  -------------- ---- ---- -
DEL 0150  Note: Congratulations on making the sale!  Hit CONTINUE   Continue                      DEL  9999
          and then CLOSE PROSPECT to begin your next sale.
                                                                                  BEB
---- ----  ----------------------------------------------  --------------------  --- ----------  -------------- ---- ---- -
```

FIG. 26

PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE=   5

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
DEM 0100	Let me start the car, and I'll show you more about the interior of this vehicle.	OK No time Not buying			DEM 0140 DEM 0110 DEM 0120
DEM 0110	No time: I understand that you are in a hurry. But for each car you sit in, you will gain a better feel for exactly what you want in a vehicle, and you will actually save time in selecting the vehicle you want.	OK No really, no time			DEM 0140 DEM 0190
DEM 0120	Not buying today: That's a smart way to shop for vehicles. Since you are just beginning your search for a new vehicle, you will want to start getting a feel for what you like and don't like in a vehicle. The best way to do just that is to sit in the car for just a few minutes.	Continue			DEM 0121
DEM 0121	Not buying today: You may decide you really like the vehicle. Or you may decide you need to come back and look at it again when you are ready to buy. Either way, you will have made one more step in your decision making process.	OK No			DEM 0140 DEM 0190
DEM 0140	Note: Take the time to explain or review one or more of the interior features covered in the product presentation.	Continue			DEM 0150
DEM 0150	Let's take the car around the block.	OK No time Not ready Not buying			DEM 0200 DEM 0160 DEM 0170 DEM 0180
DEM 0160	No time: I understand that you are in a hurry. Who has hours of time to waste in every car dealership they visit? Let's take 10 minutes driving it around the block so you'll	OK No really, no time			DEM 0200 DEM 0190

FIG. 27

```
                  become a little more familiar with this vehicle.
---- ----  ------------------------------------------------------   -------------------- --- ---------- -------------- ---- ---- -
DEM 0170 Not Ready:                                                   OK                                                DEM  0200
         * I understand how you feel.                                 Really, not ready                                 DEM  0190
         * I once felt that way myself when I first began to search
           for a new car.
         * But I found that by driving each vehicle that interested
           me, I was better able to define what I did and didn't
           like and it actually made my search easier.
---- ----  ------------------------------------------------------   -------------------- --- ---------- -------------- ---- ---- -
DEM 0180 Not buying today: That's fine.  Let me show you the         OK                                                DEM  0200
         comfortable ride this vehicle offers.  No one can make       No                                                DEM  0190
         you buy a vehicle just for test driving it.
```

FIG. 28

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE=   6

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ	*
DEM 0190	Well let's make an appointment for you to come in and spend a little time in this vehicle. Are you free tonight? How about tomorrow evening? Which is best for you?	OK No		 APPTDATE	DEM 0191 DEM 1020	
DEM 0191	Would 7 or 7:15 be more convenient for you? Le me mark it in my schedule here.	Continue		 APPTTIME	DEM 0195	
DEM 0195	Now, you will call me if something changes on your end, won't you? And I'll do the same for you if something changes on my end. Where can I reach you -or- your answering machine?	Home Phone Work Phone Cell Phone No Phone Given			DEM 0196 DEM 0197 DEM 0198 DEM 0199	
DEM 0196	Home phone:	Continue Work# also given		 BUYERHOMEPH	DEM 0199 DEM 0197	
DEM 0197	Work phone:	Continue Cell# also given		 BUYERWORKPH	DEM 0199 DEM 0198	
DEM 0198	Cell phone:	Continue Home# also given			DEM 0199 DEM 0196	
DEM 0199	Great, I'll see you then.	Continue	BEB		DEM 9999	
DEM 0200	Note: When on the demo ride, be sure to let all drivers take a turn behind the wheel. Sit in the back if there is another driver in the group. He or she will enjoy the ride more in the passenger seat.	Continue			DEM 0210	
DEM 0210	I think you'll find you like how this vehicle rides. We'll take it on the highway if you like. First take a right onto the feeder and then take another right at the first street you see.	Tell DLR story 1			DEM 0220	

FIG. 29

DEM 0220	See these trees on the edge of the lot? Mr. Jones planted those when he built this dealership back in 1955. We have a picture of the dealership back then, you can see how small the trees were. It's hard to believe we've been servicing people here at ABC Motors for over 40 years. Remind me to show you the picture when we get back.	Continue			DEM 0230
DEM 0230	What made you decide to look at this vehicle?	Continue	PER	LASTNOTE	DEM 0240
DEM 0240	Note: On the demo drive, point out features the prospect has shown an interest in during the product presentation.	Continue			DEM 0250

FIG. 30

```
CLNT TST002              PRINT 415 RECORDS - REPORT 022                    RUN 09/10/97  15:35:40  PAGE=   7

STEP SEQ  SCRIPT TEXT                                              ANSWER          GOTO PUT DATA   IN FIELD      STEP SEQ  *
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -

          NOTE the three items the prospect stated he really WANTS
          in a vehicle are displayed behind this script.  Try to
          get the prospect to give a YES response to your questions,          WAN
          which VALIDATES that the vehicle does meet their wants.
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
DEM 0250  This vehicle sure has great response, doesn't it?       Yes                                           DEM  0260
          The stereo system in this vehicle sure sounds good,     No                                            DEM  0300
          doesn't it?                                             Continue                                      DEM  0310
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
DEM 0260  Notice the leg room, and there's still plenty of room in Yes                                          DEM  0310
          the back.  You'll be able to fit your family or friends  No                                           DEM  0300
          in here comfortably, right?                              Continue                                     DEM  0310
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
DEM 0300  Responses to NO answers are:                            Continue                                      DEM  0310
          - Why do you say that?
          - Would you elaborate?
          - I understand.
          - Or, just move on to the next question without responding.
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
DEM 0310  Where is the first place you would take you new vehicle? Continue                                      DEM  0320
          Who is the first person you would take for a drive in
          your new vehicle?
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
DEM 0320  We have a shuttle for our service customers.  Do you live Yes                                          DEM  0330
          or work close by?                                        No                                           DEM  0340
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
DEM 0330  Great, then you will be sure to take advantage of the three Continue                                  DEM  0350
          FREE Lube, Oil, and Filter changes we include at no extra
          charge with the sale of every vehicle.
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
DEM 0340  Well, I'm sure you will still want to make it in for the Continue                                      DEM  0350
          three FREE Lube, Oil, and Filter changes we include at no
          extra charge with the sale of every vehicle.
---- ----  -----------------------------------------------------  --------------- --- ----------- ------------- ---- ---- -
```

FIG. 31

PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE=   8

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ
GRT 0050	Welcome to ABC Motors. How may I assist you today?	We need a new car				GRT 0300
		We're just looking				GRT 0300
		How much is this c				GRT 0100
GRT 0100	I'll be happy to get you a price on a car. So, is this the car you've decided to buy?	Yes - the exact on				GRT 0110
		No/Undecided				GRT 0120
		At the right price				GRT 0125
GRT 0110	Great, have you already had a chance to test drive it?	Yes - here	B		PROSPTYPE	GRT 0130
		Yes - elsewhere				GRT 0305
		No				GRT 0120
GRT 0120	Well, then let's make sure it's the right car before we price it for you. Because if it's not the car you want, then it doesn't matter what the price is, right?	OK				GRT 0300
		Just need a price				GRT 0200
GRT 0125	Well, then let's make sure it's the right car before we price it for you. Because if it's not the car you want, then it doesn't matter how great the price is, right?	OK				GRT 0300
		Just need a price				GRT 0200
GRT 0130	Great, welcome back. So you've already had a chance to do some shopping.	Continue				GRT 1300
GRT 0200	Okay, follow me to get a price on this vehicle. I'll introduce you to our sales manager, who will be able to give you a price.	Continue				GRT 1300
GRT 0300	Great. Is this your first visit to ABC Motors?	Yes - First	F		PROSPTYPE	GRT 0310
		No - Serviced here	F		PROSPTYPE	GRT 0320
		No - Bought here	F		PROSPTYPE	GRT 0320
		No - Shopped here	B		PROSPTYPE	GRT 0320
			SC		SOURCECODE	
			2B		SOURCECODE	
GRT 0305	And is this your first visit to ABC Motors?	Yes - First	F		PROSPTYPE	GRT 1300
		No - Serviced here	F		PROSPTYPE	GRT 0325
		No - Bought here	F		PROSPTYPE	GRT 0325
		No - Shopped here	B		PROSPTYPE	GRT 0325

FIG. 32

| | | | | SC | SOURCECODE | | |
				2B	SOURCECODE		
GRT	0310	Let me explain our layout for you. New Cars are in the front. Explorers, Minivans, and New Trucks are on the side of the building. Our Pre-Owned Vehicles are displayed in the adjacent lot.	Continue			GRT	1000
GRT	0320	Super. Welcome back.	Continue			GRT	1000
GRT	0325	Welcome back.	Continue			GRT	1300
GRT	1000	Are you interested in a New Ford product or a	New	N	WANTNEWUSED	GRT	1300

FIG. 33

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ	*
	Pre-Owned vehicle?	Pre-Owned		U	WANTNEWUSED	GRT 1300	
		Undecided		-	WANTNEWUSED	GRT 1300	
GRT 1300	By the way, I'm....	Continue				GRT 1301	
GRT 1301	What's your name? Do you mind if I write that down?	Continue			BUYERNAME	GRT 1305	
GRT 1305	This computer is great. The owner, Mr. Jones, believes that every customer should be given our best treatment possible and has asked us to use it with each visitor. Is that OK with you?	OK				GRT 1310	
GRT 1310	Mr. Jones has also asked us to conduct a VERY SHORT SURVEY to determine which advertising sources are most effective. Your answers are so important to us that he has asked us to log every response.	Continue				GRT 1320	
GRT 1320	First, which advertising source listed here BEST represents the reason you chose to visit our dealership?	Continue			SOURCECODE	GRT 1330	
GRT 1330	Second, what is your ZIP code?	Continue			BUYERZIP	GRT 1340	
GRT 1340	Great. THANK YOU for taking a moment to answer those two questions.	Continue				GRT 1350	
GRT 1350	Note: When you hit CONTINUE, this script will disappear. No more scripts will display until you: 1. Hit the NEW key if this is a new prospect. 2. Hit the SEARCH key if this person has been here before. 3. Hit the CANCEL key if you want to start over.	Continue				GRT 9999	

FIG. 34

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ	*
PRO 0030	I have one more question of you. It will help me understand your needs a little better. Which of the following items are most important to you in a vehicle? Note: More than one answer may be selected. This screen will remain displayed until you hit 'NEXT/MORE'.	Safety Performance/Mech Reliability Next/More Choices	1 1 1	MOTIVATION01 PRO 0030 MOTIVATION02 PRO 0030 MOTIVATION03 PRO 0030 PRO 0031		
PRO 0031	Note: You have NINE choices. You may look through all of the choices by using the 'Next' or 'Previous' buttons to move back and forth between the screens.	Interior Room Economy Comfort/Convenienc Next/More Choices	1 1 1	MOTIVATION04 PRO 0031 MOTIVATION05 PRO 0031 MOTIVATION06 PRO 0031 PRO 0032		
PRO 0032	Note: When you are done with your selections, hit 'Done'. Else hit 'Previous' for more choices.	Style Off-Road Snow Done	1 1 1	MOTIVATION07 PRO 0032 MOTIVATION08 PRO 0032 MOTIVATION09 PRO 0032 PRO 9999		

FIG. 35

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE= 11

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ *
SEL 0010	Note: What is our next step in SELECTING a vehicle? 1. Enter the stock number for the vehicle we've chosen. 2. I have a vehicle in mind to show, and want to see if it is available. 3. Use Vehicle Search to select a vehicle.	1. Enter Stock# 2. Check Vehicle 3. Vehicle Search			SEL 0020 SEL 0030 SEL 0040
SEL 0020	Enter the STOCK# of the vehicle. It is displayed on the upper right hand corner of the BAR code sticker on the windshield. The system will accept the STOCK# when you hit CONTINUE if the vehicle is available for sale.	Continue			SEL 9999 Y
			SEL	UNIT1STOCKNO	
SEL 0030	Walk over to the vehicle you have in mind, and enter the STOCK#. The system will accept the STOCK# if the vehicle is available.	Continue			SEL 9999 Y
			SEL	UNIT1STOCKNO	
SEL 0040	1. When you hit CONTINUE, the Vehicle Search screen will be displayed. The entries you have made regarding the prospect's wants should already be on the screen. 2. You may make further entries or you may hit SEARCH. 3. After you select the vehicle you want, click on the PRO button to begin the Product Presentation.	Continue			SEL 9999 Y
			SEL		

FIG. 36

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE= 12

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP	SEQ	*
TRA 0005	Before we go in....	Continue				TRA	0010	
TRA 0010	May we make you an offer on your trade-in?	Yes No Not Sure		YES NO NOT SURE	BUYERMISC1 BUYERMISC1 BUYERMISC1	TRA TRA TRA	0040 0020 0020	
TRA 0020	Naturally you are not required to accept our offer if you don't think it's fair, but at least you will get an idea of what DEALERS WILL PAY for your vehicle in the Houston market. Also, don't forget that applying your trade against the purchase price of the vehicle saves you money in TAXES.	Okay No				TRA TRA	0040 0030	
TRA 0030	I understand your feelings. Let's get you the figures on your new car. Right this way.	Continue				TRA	9999	
TRA 0040	Let me collect some data about your vehicle and then tell you what the Used Vehicle Buyer is going to look at when he evaluates your trade.	Continue				TRA	0040	
TRA 0050	What is the LICENSE plate number?	Continue		TX	TRADESTATE TRADELICENSE	TRA	0051	
TRA 0051	What is the LICENSE STATE?	Continue			TRADESTATE	TRA	0060	
TRA 0060	What is the ODOMETER?	Continue		AT	TRADETRANS TRADEMILEAGE	TRA	0070	
TRA 0070	Is this an automatic?	Continue			TRADETRANS	TRA	0080	
TRA 0080	What COLOR is it?	Continue			TRADECOLGRP	TRA	0100	
TRA 0100	Enter the VIN:	Continue			TRADEVINNUM	TRA	0110	

FIG. 37

```
TRA 0110 Ask: Do you owe anything on your trade?          Yes                                          TRA  0130
                                                          No                                           TRA  0140
                                                          Yes, but $$ unknow                           TRA  0120
                                                                                    TRADELIENBAL
---- ---- ------------------------------------------   ------------------ --- ---------- ------------- ---- ---- -
TRA 0120 That's okay.  We can get that information later.  Continue                                    TRA  0130
---- ---- ------------------------------------------   ------------------ --- ---------- ------------- ---- ---- -
TRA 0130 Ask: To whom do you owe the outstanding balance?  FMCC           FMCC       TRADELIENNAM TRA  0140
                                                          Wells Fargo     Wells Farg TRADELIENNAM TRA  0140
                                                          First Security  First Secu TRADELIENNAM TRA  0140
                                                          Other                                       TRA  0131
---- ---- ------------------------------------------   ------------------ --- ---------- ------------- ---- ---- -
TRA 0131 Ask: To whom do you owe the outstanding balance?  Continue                                    TRA  0140
```

FIG. 38

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ	*
					TRADELIENNAM		
TRA 0140	Okay, let me tell you how the Used Vehicle Buyer will evaluate on your trade, so you'll have a good idea of the process he uses.	Continue				TRA 0150	
TRA 0150	First he checks the BODY for damage. This includes the Top, Hood, Fenders, Doors, Deck lid, Bumper, Grill, Paint, and Glass.	Continue				TRA 0160	
TRA 0160	Next he checks the DRIVE TRAIN. This includes examining the engine and transmission, the alternator, battery and cables, starter, pump and compressor, radiator, hoses and belts, emission control, clutch, U joints, differntial and exhaust system.	Continue				TRA 0170	
TRA 0170	Third, he checks the RUNNING GEAR. This includes looking at each tire for wear, examining the wheels, caps and brakes. He'll look at the wheel alignment, whether the tires have been rotated properly, the steering adjustment, springs, shocks and the front end.	Continue				TRA 0180	
TRA 0180	Finally, he looks over the interior. He looks at the upholstery, mats and carpet, A/C and heater, radio - tape - antenna, headliner, seats, windows, sun roof, windshield wiper and washer, instruments, horn lights - signals - lenses, tire jack and spare, and tools.	Continue				TRA 0190	
TRA 0190	The reason I go into such detail on how we appraise your trade is this, we want to give you a fair price. We also want you to understand what we evaluate to make up that fair price. It includes excess mileage, wear and tear, and repairs necessary for us to turn around and sell the car to another customer like you.	Continue				TRA 0200	
TRA 0200	Based on your experience with this vehicle, and what I've told you so far, how would you rate the CONDITION of this vehicle? You are not required to answer this question.	POOR (wholesale) FAIR (major recon) GOOD (recondition)	POOR FAIR GOOD		TRADECOND TRADECOND TRADECOND	TRA 0240 TRA 0240 TRA 0240	

FIG. 39

			EXC (retail as is	EXC	TRADECOND	TRA	0240
TRA 0240	Okay, that'll do it.		Continue			TRA	0250
TRA 0250	I will turn in your vehicle information to our Used Vehicle Buyer and he will give us the Houston market value on the car. Will you loan me the keys for a few minutes?		Continue			TRA	9999 Y

FIG. 40

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP	SEQ	*
U01 0010	Let's walk this way. Back here in service we have six SERVICE ADVISORS with a combined total of over 75 years experience in the dealership service industry. The plaques you see outside each one's office are for the customer service awards they've won.	Continue				U01	0020	
U01 0020	Every person who works in this dealership takes an annual course on what we call the CUSTOMER-FOR-LIFE philosophy. Have you heard of it?	Yes No				U01 U01	0025 0030	
U01 0025	Well then you already know that....	Continue				U01	0030	
U01 0030	The CUSTOMER-FOR-LIFE philosophy means we don't just sell you one vehicle and then never see you again. We want to follow up to make sure you are satisfied with the vehicle and with every single service experience you have at ABC Motors. We try to build a relationship with you so that you will want to come back to us.	Continue				U01	0045	
U01 0045	This is our LUBE, OIL, FILTER center. We reconstructed reconstructed it last year and have a 27 minute guarantee on getting you in and out, or your LOF is free. As you can see, you can also view the activities of the LOF center from the customer lounge.	Continue				U01	0050	
U01 0050	Here is our CUSTOMER LOUNGE. As you see, it is equipped with free telephones, fax machine, coffee, and morning snacks for your use if you choose to wait for your vehicle while it is serviced.	Continue				U01	0060	
U01 0060	We also have a SHUTTLE SERVICE in the mornings so you can drop your vehicle off and then go to work without waiting on your vehicle.	Continue				U01	0070	
U01 0070	This is our CASHIER.	Continue				U01	0080	
U01 0080	Let's go through this door to get to the front area. Now down this hallway is the picture of the dealership back in	Continue				U01	0090	

FIG. 41

```
         in 1955.  We also post some of the nice letters customers
         have written us on our WALL OF FAME.
         Now let's go get you those figures.
---- ----  ------------------------------------------------   ------------------- --- ---------- ------------- ---- ---- -
U01 0090 The water fountain and the restrooms are down that hall    Continue                                   U01  9999 Y
         if you need them.  May I offer you a coke?
---- ----  ------------------------------------------------   ------------------- --- ---------- ------------- ---- ---- -
```

FIG. 42

```
CLNT TST002                  PRINT 415 RECORDS - REPORT 022               RUN 09/10/97  15:35:40   PAGE=  15

STEP SEQ  SCRIPT TEXT                                            ANSWER              GOTO PUT DATA   IN FIELD     STEP SEQ  *
---- ---- --------------------------------------------------    --------------- --- ---------- -------------    ---- ---- -

U02 0010 Why buy from ABC Motors?                                Dealer                                         U02  0020
                                                                 Inventory                                      U02  0200
                                                                 Parts and Service                              U02  0400
                                                                 Rental                                         U02  0500
---- ---- --------------------------------------------------    --------------- --- ---------- -------------    ---- ---- -
U02 0020 Choose one of the following reasons for buying at       "No Problem" Philo                             U02  0030 Y
         / ABC Motors.  "Dealer Stories"                         Mission Statement                              U02  0040 Y
                                                                 #1 Ford Volume                                 U02  0050 Y
                                                                 More                                           U02  0021
---- ---- --------------------------------------------------    --------------- --- ---------- -------------    ---- ---- -
U02 0021 Choose one of the following reasons for buying at       Top 100 Club                                   U02  0060 Y
         ABC Motors (cont'd).  "Dealer Stories"                  #1 Jeep Volume                                 U02  0070 Y
                                                                 Eagles Club                                    U02  0080 Y
                                                                 More                                           U02  0022
---- ---- --------------------------------------------------    --------------- --- ---------- -------------    ---- ---- -
U02 0022 Choose one of the following reasons for buying at       Top Hyundai Volume                             U02  0090 Y
         ABC Motors (cont'd).  "Dealer Stories"                  Customer Loaners                               U02  0100 Y
                                                                 Main Menu                                      U02  0010
                                                                 End                                            U02  9999
---- ---- --------------------------------------------------    --------------- --- ---------- -------------    ---- ---- -
U02 0030 "No Problem" Philosophy:                                More                                           U02  0040
         For over 40 years, ABC Motors has had one simple goal,  Previous Menu                                  U02  0020
         to exceed our customers' expectations.  Our "No Problem" Main Menu                                     U02  0010
         Philosophy means that we always look for a way to ensure End                                           U02  9999
         that this goal is met.  Our mission statement is on a card
         that we all carry.  It was developed and approved by the
         over 200 employees that we have here at ABC Motors.
---- ---- --------------------------------------------------    --------------- --- ---------- -------------    ---- ---- -
U02 0040 Mission Statement:                                      Continue                                       U02  0045
         We at ABC Motors are fully committed to providing
         an automotive experience that exceeds our customers'
         expectations.
---- ---- --------------------------------------------------    --------------- --- ---------- -------------    ---- ---- -
U02 0045 Mission Statement (cont'd):                             More                                           U02  0050
                                                                 Previous Menu                                  U02  0020
         Our emphasis on teamwork, combined with a high level of Main Menu                                      U02  0010
         dedication and integrity, further define this commitment End                                           U02  9999
         to excellence.
```

FIG. 43

```
---- ----  --------------------------------------------------  ------------------  ---  ----------  -------------  ----  ---- -
U02  0050  #1 Ford Volume:  We know we've been successful because....  More                               U02   0060
                                                                      Previous Menu                       U02   0020
           More people buy a Ford from us than any of the other 150   Main Menu                           U02   0010
           Ford dealers in the Texas region.  We've been the top      End                                 U02   9999
           volume Ford dealership for the past 4 years: 1993-1996.
---- ----  --------------------------------------------------  ------------------  ---  ----------  -------------  ----  ---- -
U02  0060  Top 100 Club:  We know we've been successful because....   More                               U02   0070
                                                                      Previous Menu                       U02   0020
           We're also a member of the prestigious Top 100 Club, a     Main Menu                           U02   0010
           national award from Ford for dealers who combine           End                                 U02   9999
           outstanding volume with outstanding customer satisfaction.
---- ----  --------------------------------------------------  ------------------  ---  ----------  -------------  ----  ---- -
```

FIG. 44

```
---- ---- ------------------------------------------------   ------------------ --- ---------- ------------ ---- ---- -
U02 0205 As you can expect, we are determined to maintain our    Great Leasing/fina                            U02  0210 Y
         volume leadership, and therefore will bend over         Over 1,000 vehicle                            U02  0220 Y
         backwards to ensure that you are completely satisfied   Great Pricing                                 U02  0230 Y
         with anything that we do to serve your needs.           More                                          U02  0206
---- ---- ------------------------------------------------   ------------------ --- ---------- ------------ ---- ---- -
U02 0206 Choices cont'd.  New Cars and Trucks.                   Main Menu                                     U02  0010
                                                                 End                                           U02  9999
---- ---- ------------------------------------------------   ------------------ --- ---------- ------------ ---- ---- -
U02 0210 New Cars and Trucks - Great leasing/financing:          Continue                                      U02  0220
                                                                 Previous Menu                                 U02  0200
         Our leasing and financing programs are the best available.  Main Menu                                 U02  0010
         Our #1 volume status ensures that we have the most     End                                           U02  9999
```

FIG. 45

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
U02 0070	#1 Jeep Volume: We know we've been successful because....	More			U02 0080
		Previous Menu			U02 0020
	More people buy a Jeep from us than any of the other 85	Main Menu			U02 0010
	Jeep dealerships in the Texas region. We've been the top	End			U02 9999
	Jeep dealership for the past 2 years: 1994 and 1995.				
U02 0080	Eagles Club: We know we've been successful because....	More			U02 0090
		Previous Menu			U02 0020
	We're also a member of the prestigious Eagles club, a	Main Menu			U02 0010
	national award from Chrysler for dealers who combine	End			U02 9999
	outstanding volume with outstanding customer satisfaction.				
U02 0090	Top Hyundai Volume: We know we've been successful because..	More			U02 0100
		Previous Menu			U02 0020
	We are also a top Hyundai dealership with excellent	Main Menu			U02 0010
	satisfaction scores.	End			U02 9999
U02 0100	Customer Loaners: We know we've been successful because....	Continue			U02 0105
	Our Service Department is also top-notch. In addition to				
	top caliber technicians and equipment, we also have our				
	Customer Loaner Program available for a small fee. This				
	exclusive program, available only at ABC Motors,				
U02 0105	Customer Loaners: (cont'd)	More			U02 0110
		Previous Menu			U02 0020
	provides a free rental car any time that your vehicle is	Main Menu			U02 0010
	in for repairs -or- maintenance, as well as giving you	End			U02 9999
	free TX state inspection.				
U02 0110	We look forward to welcoming you into our family of	Continue			U02 0200
	completely satisfied customers. We are #1 for a lot of	Previous Menu			U02 0020
	very good reasons. Experience the ABC Motors difference.	Main Menu			U02 0010
		End			U02 9999
U02 0200	Choose one of the following categories for buying at	New Cars and Truck			U02 0205
	ABC Motors. "Inventory Stories"	Used Cars and Truc			U02 0300
		Main Menu			U02 0010
		End			U02 9999

FIG. 46

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE= 17

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ	*
	competitive programs available for our customers.					
U02 0220	New Cars and Trucks - Over 1,000 vehicles: Being the largest also means that our selection of new cars and trucks is the best around. At any point in time, we have over 1,000 new vehicles available for you to select from... this means the right vehicle for you, ready to take home with you today.	Continue Previous Menu Main Menu End			U02 0230 U02 0200 U02 0010 U02 9999	
U02 0230	New Cars and Trucks - Great Pricing: And, of course, no one can sell as many cars and trucks as we do, without having great pricing. This combination of price and selection is just not available anywhere else in the region.	Continue Previous Menu Main Menu End			U02 0240 U02 0200 U02 0010 U02 9999	
U02 0240	ABC Motors is, therefore, the only place to buy your new car or truck. Be part of our family of completely satisfied new vehicle owners.	Continue Previous Menu Main Menu End			U02 0300 U02 0200 U02 0010 U02 9999	
U02 0300	At ABC Motors, our reputation is at stake every time we sell a used car or truck. For years our customers have come to us expecting the finest in sales and service, and we've gone to extraordinary measures to ensure that every vehicle on the lot meets their expectations.	200 to choose from Proud to sell Thorough reconditi More			U02 0310 U02 0320 U02 0330 U02 0301	Y Y Y
U02 0301	More choices (cont'd). Used Cars and Trucks.	3 Month / 3,000 Mi Financed on the Sp Main Menu End			U02 0340 U02 0350 U02 0010 U02 9999	Y Y
U02 0310	Used Cars and Trucks - 200 to choose from: We usually carry at least $1 million in late model, low mileage vehicles. This represents around 200 premium cars and trucks at any one time. Since we sell more new Ford's and new Jeep's than anyone else in the Texas region, and	Continue Previous Menu Main Menu End			U02 0320 U02 0300 U02 0010 U02 9999	

FIG. 47

```
           are a top Hyundai dealership as well, we have our pick of
           a huge volume of vehicles for resale on our lot.
---- ----  --------------------------------------------------------  -------------------- --- ----------- ------------ ---- ---- -
U02 0320   Used Cars and Trucks - Proud to sell:                     Continue                                          U02  0330
                                                                     Previous Menu                                     U02  0300
           This also means that we can be very choosy about what we   Main Menu                                         U02  0010
           offer, and we are.  Any vehicles that we wouldn't be proud End                                               U02  9999
           to sell, we simply sell to the wholesalers, who then
           re-sell to other lots.
---- ----  --------------------------------------------------------  -------------------- --- ----------- ------------ ---- ---- -
U02 0330   Used Cars and Trucks - Thoroughly recondition:            Continue                                          U02  0340
                                                                     Previous Menu                                     U02  0300
           We thoroughly recondition AND clean every hand-picked used Main Menu                                         U02  0010
```

FIG. 48

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP	SEQ	*
	car and truck that we sell, following an extensive mechanical, electrical, and cosmetic checklist.	End				U02	9999	
U02 0340	Used Cars and Trucks - 3 month / 3,000 mile:	Continue				U02	0350	
		Previous Menu				U02	0300	
	Each used vehicle is backed by a 3 month / 3,000 mile	Main Menu				U02	0010	
	guarantee. Since our vehicles are so good, extended	End				U02	9999	
	service plans are available for even longer periods of time.							
U02 0350	Used Cars and Trucks - Financing on the spot:	Continue				U02	0360	
		Previous Menu				U02	0300	
	Financing is available right on the spot at very	Main Menu				U02	0010	
	competitive terms, and we even have great lease programs	End				U02	9999	
	if you want the lowest payment possible.							
U02 0360	If you are thinking of a quality pre-owned vehicle, see	Continue				U02	0400	
	what impressive quality really means in a used car or	Previous Menu				U02	0300	
	truck. We look forward to welcoming you into our family	Main Menu				U02	0010	
	of completely satisfied customers. We are #1 for a	End				U02	9999	
	lot of very good reasons. Experience the McCafferty difference.							
U02 0400	Choose one of the following reasons for buying at	Convenient				U02	0410	Y
	ABC Motors.	Personal Advisor				U02	0420	Y
		State-of-the-art e				U02	0430	Y
	Service and Parts:	More				U02	0401	
U02 0401	Choose one of the following reasons for buying at	Saves Money				U02	0440	Y
	ABC Motors.	Accurate Repairs				U02	0450	Y
		"Do it right"				U02	0460	Y
	Service and Parts: (cont'd)	More				U02	0402	
U02 0402	Choose one of the following reasons for buying at	Main Menu				U02	0010	
	ABC Motors.	End				U02	9999	
	Service and Parts: (cont'd)							
U02 0410	Service and Parts - Convenient:	Continue				U02	0420	

FIG. 49

```
                                                        Previous Menu                          U02    0400
Our Service Department is convenient for both pick-up and   Main Menu                          U02    0010
drop-off customers.  Service is open from 7:30am to 7:30pm, End                                U02    9999
Monday through Friday, and by appointment on Saturday.
---- ---- ------------------------------------------------  ------------------- --- ---------- --------- ---- ---- -
U02 0420 Service and Parts - Personal Advisor:              Continue                            U02    0430
                                                            Previous Menu                       U02    0400
You will be assigned your own personal service advisor.     Main Menu                           U02    0010
This means that they get to know your vehicles, and they    End                                 U02    9999
ensure that you are completely satisfied on every visit.
---- ---- ------------------------------------------------  ------------------- --- ---------- --------- ---- ---- -
U02 0430 Service and Parts - State-of-the-art:              Continue                            U02    0440
                                                            Previous Menu                       U02    0400
```

FIG. 50

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ	·
	Our factory-trained technicians always work with the latest state-of-the-art equipment.	Main Menu End			U02 0010 U02 9999	
U02 0440	Service and Parts - Saves Money:	Continue Previous Menu			U02 0450 U02 0400	
	This means accurate diagnostics, and efficient repair methods that save you valuable time and money.	Main Menu End			U02 0010 U02 9999	
U02 0450	Service and Parts - Accurate Repairs:	Continue Previous Menu			U02 0460 U02 0400	
	We have over 40 service technicians and a HUGE inventory of parts available for every level of repair. This means prompt and accurate handling of any service needs that you have.	Main Menu End			U02 0010 U02 9999	
U02 0460	Service and Parts - "Do it right":	Continue Previous Menu			U02 0470 U02 0400	
	This caring attention to your service needs is a tradition that we've maintained since our founding in 1955, and is one of our primary reasons for our success over 40 years. We are dedicated to the "do it right the first time, every time" philosophy.	Main Menu End			U02 0010 U02 9999	
U02 0470	We look forward to your visit. We are devoted to your complete satisfaction.	Continue Previous Menu Main Menu End			U02 0500 U02 0400 U02 0010 U02 9999	
U02 0500	Choose one of the following reasons for buying at ABC Motors.	200 Vehicles Competitive Rates Convenient More			U02 0510 Y U02 0520 Y U02 0530 Y U02 0501	
	We take our Rental Department very seriously. If your impression of dealership rental departments is that they aren't REALLY in the business, prepare for us to exceed your expectations.					
U02 0501	Choose one of the following reasons for buying at ABC Motors. (cont'd)	Top Choice Main Menu			U02 0540 Y U02 0010	

FIG. 51

```
                                                              End                                        U02  9999
We take our Rental Department very seriously.  If your
impression of dealership rental departments is that they
aren't REALLY in the business, prepare for us to exceed
your expectations.
---- ----  ----------------------------------------------   -------------------- --- ---------- ------------- ---- ---- -
U02 0510 Rental - 200 vehicles:                               Continue                                  U02  0520
                                                              Previous Menu                             U02  0500
We offer a full range of over 200 Ford and Jeep/Eagle cars    Main Menu                                 U02  0010
and trucks as well as specialty vehicles such as:             End                                       U02  9999
     * 4x4's           * Luxury Conversion vans (TV's, VCR's)
     * Cargo vans      * 15 Passenger vans
     * Convertibles
```

FIG. 52

PRNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE= 20

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP	SEQ	*
U02 0520	Rental - Competitive Rates:	Continue			U02	0530	
		Previous Menu			U02	0500	
	We have very competitive rates. Deeply discounted weekly	Main Menu			U02	0010	
	and monthly rates are also available for your convenience.	End			U02	9999	
U02 0530	Rental - Convenient:	Continue			U02	0540	
		Previous Menu			U02	0500	
	We are open the same hours as the dealership, offering	Main Menu			U02	0010	
	very convenient pick-up and drop-off, early in the morning	End			U02	9999	
	or late in the evening.						
U02 0540	Rental - Top Choice:	Continue			U02	0550	
		Previous Menu			U02	0500	
	If you need short term transportation, ABC Motors is	Main Menu			U02	0010	
	your top choice.	End			U02	9999	
U02 0550	We are dedicated to your complete satisfaction.	Previous Menu			U02	0500	
		Main Menu			U02	0010	
		End			U02	9999	

FIG. 53

CLNT TSTOO2   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE=   21

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ *
WAN 1320	Do you mind if I ask you a few questions about your automotive needs?	Go ahead			WAN 1400
		No			WAN 1330
		Why?			WAN 1330
	What we can do is full out the questions together on this computer, then we'll have a better idea of what you want.	Not much time avai			WAN 1340
WAN 1330	I have found that by getting all of this down on the computer, I gain a better sense of your needs. Plus, we'll easily be able to pull it back up should you return to us or call back at a later date. So, will it be all right if I ask you a few questions?	Yes			WAN 1400
		No			WAN 1350
WAN 1340	I have found that by better learning what your needs are, we can SAVE YOU TIME in finding the perfect vehicle. Plus, by making note of your needs, you won't have to spend time re-explaining what you want when you call or return at a later date. So will it be all right if I ask a few questions?	Yes			WAN 1400
		No			WAN 1350
WAN 1350	That's fine. I respect your wishes.	Yes			SEL 9999
		No			WAN 1380
	Do you have any questions that I can answer?				
WAN 1380	Well, my name is.... If you need any assistance I'll be standing out in front of the showroom, please don't hesitate to call out to me. Also, here's my card if you decide you have questions about our inventory when you get home.	Continue			SEL 9999
			BEB		
WAN 1400	Do you already have a particular vehicle in mind?	Right here			WAN 1405
		Yes			WAN 1450
		No			WAN 1450
WAN 1405	Great, let me enter the stock number and vehicle information.	Continue			WAN 1410
				UNIT1STOCKNO	
WAN 1410	Is the vehicle new or used?	New	N	WANTNEWUSED	WAN 1415

FIG. 54

		Used		U	WANTNEWUSED	WAN	1415
				FORD	WANTCARMAKE		
WAN	1415	What is the make of the vehicle you are entering?	Continue			WAN	1420
					WANTCARMAKE		
WAN	1420	Is the vehicle a Car or a Truck?	Car	C	WANTCARTRUCK	WAN	1425
			Truck	T	WANTCARTRUCK	WAN	1425
WAN	1425	What year is the vehicle?	Continue			WAN	1500
					WANTCARYRLO		
WAN	1450	Are you interested in a New Ford product or a	New	N	WANTNEWUSED	WAN	1455

FIG. 55

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40 PAGE= 22

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ
	Pre-Owned vehicle?	Used		U	WANTNEWUSED	WAN 1455
		Haven't decided		~	WANTNEWUSED	WAN 1455
				FORD	WANTCARMAKE	
WAN 1455	Are you looking for a car, truck, sports utility vehicle, or minivan/van?	Car		C	WANTCARTRUCK	WAN 1460
		Truck		T	WANTCARTRUCK	WAN 1460
		Sports Utility		T	WANTCARTRUCK	WAN 1460
		Van		T	WANTCARTRUCK	WAN 1460
				1	WANTATVEHCAR	
				1	WANTATVEHPUP	
				1	WANTATVEHSPT	
				1	WANTATVEHVAN	
WAN 1460	Do you have a particular MAKE in mind?	Yes				WAN 1465
		No				WAN 1475
					WANTCARMAKE	
WAN 1465	What YEAR vehicle are you looking for? Enter "oldest" year acceptable:	Continue				WAN 1470
					WANTCARYRLO	
WAN 1470	Do you have a particular MODEL in mind?	Continue				WAN 1480
					WANTCARMODEL	
WAN 1475	Do you prefer a particular BODY STYLE?	Yes				WAN 1480
		No				WAN 1480
					WANTCARBODY	
WAN 1480	What is the oldest vehicle YEAR model you will purchase?	Continue				WAN 1490
					WANTCARYRLO	
WAN 1490	What is the newest YEAR model you prefer?	Continue				WAN 1500
					WANTCARYRHI	
WAN 1500	What MAKE of vehicle do you currently drive?	Continue				WAN 1520
				TRA	TRADEMAKE	
WAN 1520	And what is the MODEL of the vehicle you currently	Continue				WAN 1550

FIG. 56

drive?

					TRADEMODEL		
WAN 1550	Would you be interested in TRADING that vehicle in to our dealership?	Yes	YES	BUYERMISC1	WAN	1600
		No	NO	BUYERMISC2	WAN	1600
		Not Sure	NOT SURE	BUYERMISC3	WAN	1600
WAN 1600	What one feature do you most like about your current vehicle and really WANT on your new vehicle? (Such as 4WD, Nice Stereo, CD, power seats, alarm, leather, fuel economy).	Continue			WAN	1610
	Enter WANT 1:		WAN	WANTMISC1		

FIG. 57

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE= 23

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ	*
WAN 1610	What second feature do you most like about your current vehicle and really WANT on your new vehicle? (Such as 4WD, Nice Stereo, CD, power seats, alarm, leather, fuel economy).	Continue				WAN 1620	
	Enter WANT 2:				WANTMISC2		
WAN 1620	What one feature have you never had but really want to have on your new vehicle? Enter WANT 3:	Continue				WAN 1730	
					WANTMISC3		
WAN 1730	Will this vehicle be for personal use or business use?	Personal		N	BUSINESSUSE	WAN 1800	
		Business		Y	BUSINESSUSE	WAN 1740	
WAN 1740	What line of business are you in?	Continue				WAN 1800	
		Why?				WAN 1741	
					BUYERTITLEOC		
WAN 1741	It's helpful to know if you'll be making deliveries such as flowers, or making purchases such as antiques, or sell a product which need you need to carry around, or carry clients to business appointments, or to work a ranch.	OK				WAN 1800	
		No Info Given				WAN 1800	
					BUYERTITLEOC		
WAN 1800	Have you set your MONTHLY budget yet?	Yes				WAN 1810	
		Don't know				WAN 1810	
WAN 1810	Do any of these monthly figures come close to what you had in mind?	$350	350		BUDGET	WAN 1900	
		$400	400		BUDGET	WAN 1900	
		$450	450		BUDGET	WAN 1900	
		More Choices				WAN 1830	
WAN 1830	Write in your budgeted monthly payment.	Continue				WAN 1900	
		Don't know yet				WAN 1840	
					BUDGET		

FIG. 58

```
WAN 1840 That's okay.  I can help you figure that out later if you     Continue                                                    WAN  1900
           like.
---- ----  ----------------------------------------------------------  -------------------- --- ---------- ------------- ---- ---- -
WAN 1900 Last question, do you have a color preference?                Continue                                                    WAN  2000
                                                                                                             WANTCARCOLOR
---- ----  ----------------------------------------------------------  -------------------- --- ---------- ------------- ---- ---- -
WAN 2000 Based on the information you've provided me, I have           Continue                                                    WAN  9999 Y
           a vehicle (or several vehicles) in mind which I believe
           will meet your needs.
---- ----  ----------------------------------------------------------  -------------------- --- ---------- ------------- ---- ---- -
```

FIG. 59

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
WRI 0010	After seating your prospects, offer them some refreshments if you haven't already done so. Folks, can I get you a refreshment? How about some coffee or a coke?	Continue	OFF		WRI 0020
WRI 0020	Read through the following screens as a refresher of what to do next, then hit HIDE SCRIPT and turn the computer so you both can see the screen. Use the Prospect Offer screen to enter the info.	Continue			WRI 0030
WRI 0030	Okay, let's enter the numbers in the computer. The selling price is _____. The Houston area market value on your trade-in is _____. With $1000 down, let's see what your payment will be. You will now have to hit SUBMIT OFFER. We'll have to wait a moment while the computer calculates the payment.	Continue			WRI 0040
WRI 0040	Okay, the vehicle is available, and the payments are calculated. • For a 48 month note, your payment would be _____. • For a 24 month lease, your payment would be _____. Which do you prefer?	Why is Lease so lo Prefer Financing Prefer Leasing			WRI 0050 WRI 0090 WRI 0090
WRI 0050	Ford is able to offer such a low lease payment because you are only paying for the portion of the vehicle you are using. We take the price of the vehicle today and subtract the guaranteed value of the vehicle at the end of the lease. This is the amount of the vehicle you are "using", and we finance this over a 24 or 36 month period.	Interested in Leas Prefer Financing			WRI 0090 WRI 0090
WRI 0090	Click on the quote the prospect is most interested in.	Continue			WRI 0100
WRI 0100	All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first. About 10% of your customers will sign on the first offer. Don't blow it by talking.	Continue			WRI 0110

FIG. 60

WRI	0110	Note: Hit HIDE SCRIPT now. Hit SHOW SCRIPT when you are ready to see the script again. Hit PREVIOUS if you'd like to go back to one of the previous scripts.	OK		WRI	1000
			Objections		WRI	0200
WRI	0200	Prospects objects to one or more of the following:	Price		WRI	0300
			Terms (Rate)		WRI	0400
			Trade Allowance		WRI	0500
			More		WRI	0210
WRI	0210	Prospects objects to one or more of the following: (cont'd)	Payment		WRI	0600
			Money Down		WRI	0700
			More		WRI	0220

FIG. 61

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP	SEQ
WRI 0220	Prospects objects to one or more of the following: (cont'd)	Not sure				WRI	0800
		Not buying today				WRI	0810
		Spouse not here				WRI	0820
		Need time to think				WRI	0830
WRI 0300	We believe we offer our vehicles for a fair, already discounted price. What price did you have in mind?	Continue			UNIT1SELL	WRI	0310
WRI 0310	Note: Hit HIDE SCRIPT and SUBMIT OFFER.	Mgmt accepts offer				WRI	0320
		Mgmt counter-offer				WRI	0330
WRI 0320	All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.	OK				WRI	1000
		More Objections				WRI	0200
WRI 0330	Mgmt has responded with a counter-offer. All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.	OK				WRI	1000
		More Objections				WRI	0200
WRI 0400	Of course, this rate is based on an average person's credit history. We can check your history now to determine if your credit will get you a better rate or to see if you qualify for any special financing. We can also increase the term (months) to bring the payment down.	Apply for credit				WRI	0410
		Increase Term				WRI	0430
WRI 0410	Note: Hit the CBI step button now to begin gathering data for the credit history check. Hit the WRI step button when you are ready to return to the write-up.	Continue				WRI	9999
WRI 0430	Note: Hit HIDE SCRIPT, change the term, and hit SUBMIT OFFER. You will then need to wait for the desk to respond.	Mgmt accepts term				WRI	0440
		Mgmt counter-offer				WRI	0450

FIG. 62

```
WRI 0440 The computer has generated the new pmt.  All we need is    OK                                                    WRI  1000
         your OK right here and we can get the paperwork started.   More Objections                                       WRI  0200
         Note: Now be SILENT.  Give the customer the pen and
         indicate the SUBMIT OFFER button.  Wait for the customer
         to respond first.
---- ---- ------------------------------------------------------ -------------------- --- ---------- ------------ ---- ---- -
WRI 0450 Mgmt has responded with a counter-offer.  All we need is   OK                                                    WRI  1000
         your OK right here and we can get the paperwork started.   More Objections                                       WRI  0200
         Note: Now be SILENT.  Give the customer the pen and
         indicate the SUBMIT OFFER button.  Wait for the customer
         to respond first.
---- ---- ------------------------------------------------------ -------------------- --- ---------- ------------ ---- ---- -
WRI 0500 Of course, the trade value is based on the Houston market's  Maintenance record                                  WRI  0510
```

FIG. 63

CLNT TST002   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE= 26

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ	*
	demand for the vehicle and the condition of the vehicle. Can you tell me anything about the vehicle which I can pass on to the Used Vehicle Buyer to increase it's value? For example, can you provide us the maintenance records or allow the next owner to call you with questions about the vehicle?	Allow phone calls Both Just wants more $$			WRI 0520 WRI 0530 WRI 0540	
WRI 0510	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. Will you allow him more money for his trade-in?	Continue			WRI 0570	
WRI 0520	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in?	Continue			WRI 0570	
WRI 0530	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. And he is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in?	Continue			WRI 0570	
WRI 0540	How much more money do you think you need for your vehicle?	<$500 >$500			WRI 0550 WRI 0580	
WRI 0550	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer doesn't have the maintenance records nor does he want a stranger calling him with questions about his old vehicle. However, he really believes his car is worth a few hundred dollars more. Is there anything you can do for him? Do you mind taking another look at the vehicle with the customer present?	Re-evaluate trade More money No more money			WRI 0560 WRI 0570 WRI 0580	

FIG. 64

```
WRI 0560  • If the buyer is available, say: Let's walk out to see the   Available                                   WRI  0570
             Used Vehicle Buyer now and we'll re-evaluate your trade-in:  Not Available                               WRI  0570
           • If the buyer is not available, say: The Buyer isn't
             available now.  Let's proceed with the credit process while
             we wait.

WRI 0570  Well, it looks like we can give you $_____ for your trade.      Yes                                         WRI  0590
          Is this acceptable to you?                                      No                                          WRI  0580
                                                                                              TRADEGROSS

WRI 0580  Well, it sounds as if you will have better luck with this       Yes, trade-in                               WRI  0590
          vehicle selling it yourself, if you don't mind dealing with     No, don't trade-in    0    TRADEGROSS       WRI  0590
          strangers or taking the chance of not selling it
```

FIG. 65

CLNT TST-02   PRINT 415 RECORDS - REPORT 022   RUN 09/10/97 15:35:40   PAGE= 27

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
	immediately. You also have a cost associated with advertising the vehicle and you lose the tax benefit from applying the trade to the new vehicle sale price. Would you like to proceed without the trade?				
WRI 0590	Note: Hit HIDE SCRIPT and SUBMIT OFFER.	Mgmt accepts offer			WRI 0591
WRI 0595	All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.	OK More objections			WRI 1000 WRI 0200
WRI 0600	Of course, there are several ways to decrease the payment. We can check your history now to determine if your credit will get you a better rate than the average rate we use as an example. We can also bump the term (months) up. You may also put more money down.	Better rate Bump term More money down Other			WRI 0410 WRI 0430 WRI 0700 WRI 0610
WRI 0610	More choices:	Trade allowance Price			WRI 0500 WRI 0300
WRI 0700	Of course, how much money would you like to put down?	Continue		DOWN PAYMENT	WRI 0310
WRI 0800	Just not sure: Many people just aren't 100% sure they are making the right move when they buy a new vehicle. Perhaps I can help you pinpoint what concerns you. Is there something about the vehicle you don't like? Or is it something else?	Don't like _____ Something else Not sure/need time			WRI 0803 WRI 0200 WRI 0801
WRI 0801	Just not sure: Well, I can understand your concern. Let me get a brochure with our prices together, you can take it home with you, and you can call me if you have any questions. That way you can consider your purchase at your leisure.	Continue			WRI 0802

FIG. 66

```
WRI 0802 Just not sure:                                    Continue                                    WRI  0822
         Now, let's make an appointment for you to return.  Would
         this evening or tomorrow be more convenient?
                                                                                           APPTDATE
---- ---- --------------------------------------------------- -------------------- --- ---------- ------------- ---- ---- -
WRI 0803 That wouldn't keep you from owning it, would it?    No                                     WRI  0804
                                                            Yes                                     WRI  0804
                                                            Maybe                                   WRI  0804
---- ---- --------------------------------------------------- -------------------- --- ---------- ------------- ---- ---- -
WRI 0804 We have three choices then.  We can look for another  Another vehicle                      WRI  0805
         vehicle which better suits your needs, we can let you think  Make appointment              WRI  0801
         about this vehicle and make an appointment to come back,  Buy this vehicle                 WRI  1000
         or you can buy this vehicle now.
```

FIG. 67

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STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ
WRI 0805	Let's find a vehicle for you that you really want. Let me check my computer to see if we have something else that better suits the needs you've described to me.	Continue				WRI 0806
WRI 0806	It may be necessary to switch the prospect on to another vehicle at this point. If this is the case, go back to the SEL (select) step to help them find another vehicle. Hit the SEL button now.	Continue				WRI 9999
WRI 0810	Not buying today: I respect that you are not planning to buy today. However, let me ask you one question. Is there any single item that is preventing you from coming to a decision today? What is that item? If we can take care of that, will you consider buying?	Yes Not buying today				WRI 0811 WRI 0812
WRI 0811	Not buying today: (cont'd) You may need to hit the MANAGER button now for assistance. Or you may determine based on their answer that they absolutely won't be buying today. Or you may find that you can answer their objection yourself.	Continue				WRI 0200
WRI 0812	Not buying today: (cont'd) I'll respect your wishes. Let's make an appointment for you to come back in when you are closer to a decision. Would tomorrow or the next day be more convenient for you?	Continue			APPTDATE	WRI 0822
WRI 0820	Spouse not here: I can certainly appreciate the fact that you would want your spouse involved in the decision. Allow me to gather all this information together for you so you can get on your way.	Continue				WRI 0821
WRI 0821	Spouse not here: Let's make an appointment for you and your spouse to return together. Would this evening or tomorrow be more convenient?	Continue			APPTDATE	WRI 0822

FIG. 68

WRI 0822	And what time would be best for you? 7pm? 7:30pm?	Continue		WRI 0823
			APPTTIME	
WRI 0823	Now, you will call me if something changes on your end, won't you? And I'll do the same for you if something changes on my end. Where can I reach you or your answering machine?	HOME PHONE WORK PHONE CELL PHONE NO PHONE GIVEN		WRI 0825 WRI 0826 WRI 0827 WRI 0828
WRI 0825	Home phone:	Continue Work# also given		WRI 0828 WRI 0826
WRI 0826	Work phone:	Continue		WRI 0828

FIG. 69

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
		Cell# also given			WRI 0827
WRI 0827	Cell phone:	Continue			WRI 0828
		Home# also given			WRI 0825
WRI 0828	Great, I'll see you then.	Continue			WRI 0829
WRI 0829	Note: Walk the prospect out, and if you aren't sure of their biggest obstacle to purchase, ask the following.... I'd like to ask one last question of you. When you go home to think about this decision, what will be your biggest concern? Perhaps I'll be able to think of a way to address it before you return.	Continue			WRI 9999
WRI 0830	Need time to think: Take all the time you need. Why don't I leave you alone for a moment to process everything. Can I get you anything while I'm up?	OK - ready to sign			WRI 1000
		Still need time			WRI 0840
		More objections			WRI 0200
WRI 0840	Still need more time: (cont'd) I'll respect your wishes. Let's make an appointment for you to come back in when you are closer to a decision. Would tomorrow or the next day be more convenient for you?	Continue		APPTDATE	WRI 0822
WRI 1000	Note: Congratulations on completing the write-up step. The next step is the credit application process.	Continue			WRI 9999

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FIG. 70

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PORTABLE SALES PRESENTATION SYSTEM WITH SELECTIVE SCRIPTED SELLER PROMPTS

CROSS-REFERENCE TO RELATED APPLICATION

This application is a continuation in part of "parent" application Ser. No. 08/587,276, filed Jan. 18, 1996, now U.S. Pat. No. 5,826,240 which is incorporated by reference in its entirety.

BACKGROUND OF THE INVENTION
Source Code Appendix

The microfiche appendix filed herewith contains computer-program source code and database information for an illustrative implementation of the invention. The source code is copyrighted and is the property of the assignee of this application. Authorization is granted to make copies of the source code in conjunction with making facsimiles of this application and any patent(s) issuing thereon, but all other rights are reserved.
Introduction

The cost of any goods or services that are sold include costs of marketing. Every item (tangible or intangible) that is sold has included in its costs, the costs of "selling" it. Millions of people are employed in "selling" and hundreds of millions of man-hours are expended in direct face-to-face "selling" every year in the United States. The cost of "selling" is every bit as real a part of the cost of an item or service as is the direct labor cost involved in manufacturing the item or providing the service.

It is generally estimated that less than 10 percent of a salesperson's total time is spent actually "selling"—i.e. the direct face-to-face contact with a prospective buyer. Therefore the efficiency of the face-to-face sales process is directly related to the quality with which the face-to-face contact is carried out.

The present invention relates to a computer system that addresses some common information-flow problems in a large "industry," namely the sales process. The computer system organizes specific information to assist salesmen or saleswomen (referred to generically as "sellers") and management in making a presentation to a potential purchaser ("prospect"), in a methodical and consistent manner. Use of the system by a seller produces a number of practical benefits, including a more effective matching of the prospect's needs to one or more specific products or services to the needs of the prospect, as well as faster determination of appropriate financing arrangements. This in turn results in a more satisfactory experience for the prospect and better on-the-job training for an inexperienced seller, both of which lead to more effective utilization of capital by the seller or his or her employer.

In a nutshell, the computer system reduces costs associated with selling, resulting in exactly the same benefits— lower cost and more effective utilization of capital—as systems which reduce costs associated with research, development, design, manufacturing, maintenance, etc.
Human-Factors Problems in Large-Volume Sales Organizations

The sales process can be usefully thought of as an interaction between a prospect and a seller. When performed correctly, the process comprises a logical series of exchanges of information between the seller and the prospect, between the seller and management, between management and a credit bureau, etc. The actual steps will vary depending upon the type of product and the industry,

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but the concept of the sales process being a sequence of definable information exchanges remains the same.

Historically, however, the actual process of selling, when done on a large scale, has been a disorganized one. Some people are thought of as "born sellers" and need little training to be effective. With suitable training, many other individuals can learn the sales process and achieve good results. In large sales organizations such as car dealerships, however, turnover is frequently high. As a result, it is often not possible to count on having a population of sellers who all either are born sellers or have had suitable training. That means that variations in natural ability and training lead to what amount to inefficiencies of scale, with a concomitant reduction in productivity.

Such inefficiencies are not inherent to large-scale sales. A significant weakness of selling on a large scale is the inability to enforce a certain measure of standardization of the sales process on large numbers of sellers so that they consistently utilize proven sales techniques.

Sales efficiency (defined here as the ratio between sales consummated to prospective buyers dealt with) improves dramatically when sellers record sufficiently complete data on sales prospects to achieve other goals, such as follow-up communication by phone or mail with those prospects that did not make a purchase, correct determination of closing ratios for each individual seller, or analysis of the advertising source that initially captured the prospect's attention. Inefficient sellers can be given additional training or, if necessary, weeded out when correct determination of sales efficiency ratios for individual sellers can be made accurately, quickly, and with reduced overhead. Advertising efficiency (defined here as the ratio of advertising dollars spent to the gross sales volume produced) is enhanced by analyzing the advertising sources that initially capture prospect attention.

An illustration of the need for such a system can be seen in a car dealership, an area in which very large dollar volume sales occur and the sales process is sometimes poorly administered. In general, dealerships have several characteristics in common:

1. Due to less-than-perfect (or even virtually non-existent) pre-employment screening, dealerships may hire sellers that lack true sales proficiency, a problem in most types of retail sales operations.

2. Due to long hours, Saturday work days, and a poor industry image, car dealerships may suffer from high levels of personnel turnover, particularly in the sales departments (in which 100%+turnover per year is not uncommon).

3. Due to turnover, dealerships are faced with a constant re-training need, which in some cases is poorly accomplished.

4. Many dealerships hire experienced sellers from other dealerships on the assumption that they are good at what they do and do not require training, when in fact these experienced sellers may use very poor sales techniques.

5. Many dealerships refrain from hiring new, inexperienced sellers because they do not want to make an investment in training or suffer loss of productivity as a new seller comes up to speed.

6. Ironically, dealerships do not want to invest in sales training precisely because turnover is high and the investment would be "wasted" in their view. This tends to produce high failure rates among new sellers.
Prior Attempts at Standardizing the Sales Process

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A scattered few vehicle manufacturers (e.g., Lexus, Infiniti, and Saturn) have spent large amounts of time and money attempting to improve the quality and consistency of procedures to if control the sales process. Dealerships that exert control over the vehicle sales process have in general been far more successful than those that have not. Many of these dealerships have elaborate pencil and paper control procedures. Some employ computerized systems, but as far as is known they record data only after the fact.

Long-Felt Need

Despite the modest success of these procedures, direct real-time supervision of the sales process has long been recognized as difficult. To be effective, such supervision must take place where the sales presentations are made, i.e., in changing physical locations throughout the dealership, not at a desk or counter where a supervisor can observe. A sales manager's presence during the conversations between the seller and the prospect, however, is likely to undermine the rapport-building that can be critical to the success of the sales process.

The problem is exacerbated by the need for ready communication between the seller and his or her manager, or "control desk." Thus, the need for direct managerial supervision is simultaneously created and made more difficult by the nature of the business. The need is highlighted by the fact that, because considerable advertising dollars are invested in attracting new business to the dealership, each prospect that is handled less than optimally may represent a substantial lost profit opportunity.

SUMMARY OF THE INVENTION

A computer system in accordance with the present invention addresses many of these problems, including improvement, standardization, and enforcement of the sales process; efficient training of new sellers; and real-time control of the process by management. The system comprises one or more handheld computer units used by sellers that may be linked with a central computer unit. Each dealership decides the exact sequence that it would like its sellers to follow. The handheld unit then prompts the seller with a standard script to be followed at each step in the process after a prospect enters the dealership. The prospect's responses to the scripted questions are used to identify the prospect's motivation (e.g., safety) or specific interest (e.g., trailer towing capacity). Software switches can be used to indicate motivations or specific interests. The switches are monitored during the sales presentation. When a motivation or interest is identified, the handheld unit prompts the seller to introduce information corresponding to the identified interest.

BRIEF DESCRIPTION OF THE DRAWINGS

FIG. 1 is a block diagram of a system in accordance with the invention.

FIG. 2 is a perspective view of a specific embodiment of a handheld unit in accordance with the invention.

FIGS. 3 through 21 are screen prints of illustrative screen displays created on a handheld unit by a specific implementation of software in accordance with the invention. The screen displays, discussed in more detail below, implement the invention for a car dealership.

FIGS. 22 through 70 are illustrative scripts used in a specific implementation of the invention for a car dealership. The organization of the scripts is discussed below.

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DETAILED DESCRIPTION OF SPECIFIC EMBODIMENTS

Overview of Illustrative Embodiment

One illustrative embodiment of the invention takes the form of a system for enforcing recording, by a seller, of information about a vehicle-purchase prospect at an automobile dealership. In the interest of clarity, not all features of an actual implementation are necessarily described in this specification, although many additional details of such an implementation can be found in the microfiche appendix. It will of course be appreciated that in the development of any such actual implementation (as in any computer-system development project), numerous engineering and programming decisions must be made to achieve the developers'specific goals and subgoals (e.g., compliance with system- and business-related constraints), which will vary from one implementation to another. Moreover, attention will necessarily be paid to proper programming practices for the environment in question. It will be appreciated that such a development effort might be complex and time-consuming, but would nevertheless be a routine undertaking of system development for those of ordinary skill having the benefit of this disclosure.

As shown in FIG. 1, at its most basic, the illustrative system comprises one or more seller computer units 110 operated by sellers and may also include a central computer 105. The seller computer unit 110 may be of a size suitable to held in a seller's hand, referred to simply as a "handheld" unit, although it may be held in the seller's hand, used on a table or on the seller's lap, suspended from a strap around the seller's neck, etc. The illustrative examples discussed below all involve such handheld units. Alternatively, the seller computer unit 110 may comprise a fixed unit, e.g., a desktop computer with suitable programming.

The handheld computer unit 110 manages a sales-information data store, utilizing any convenient database management system (DBMS) software. This sales-information data store may also be located on the central computer. The external data store(s) are remotely located at places such as vehicle manufacturers, credit bureaus, and credit granting institutions on their computer systems 115.

The Sales-Information Data Store

The sales-information data store, which may be maintained at or by the handheldz computer unit 110, or at the central computer 105, or both, includes a number of specific databases. Virtually any of the databases referred to herein can be either local databases on the handheld unit (updated periodically from a central computer or other data store, e.g., via a serial or parallel cable, a network connection, a radio link, or an infrared link) or remote databases located on the central computer, accessed through a conventional disk search or through an on-line query. Some or all of the databases may be combined if desired into a single complex database, as will be recognized by those of ordinary skill having the benefit of this disclosure. The databases include:

(1) a vehicle-inventory information database, which can include both a dealer's database as well as those vehicles in the inventory of other dealerships in a commonly owned group of dealerships. Inventory information is valuable when the seller cannot locate the particular item sought by the prospect;

(2) a customer database, containing conventional information about customers who have made purchases, enabling the seller to identify a prospect as a valuable repeat customer if one should return to the dealership;

(3) a prospect database, likewise containing similar information about prospects who have visited the dealer-

ship. With this information, management can determine if there is a pattern in the point at which sales processes are breaking down, or whether a certain seller suffers from very poor sales efficiency. Very importantly by interrogating this database a prospect can be identified as a returning prospect. A returning prospect, known in the auto industry as a "be-back" prospect, has a percentage likelihood of successful consummation of sale that is easily triple that of a prospect on a first time visit. The reason for this is that a "be-back" prospect has completed his or her shopping process and is now ready to make a purchase. For this reason a "be-back" prospect is especially valuable and deserves special attention. Further, the availability of such information saves the time involved in re-entry of data if the prospect returns to the dealership at a later date;

(4) a pending-transaction database, referred to colloquially herein as a "deal" database. Typically a record is started in the pending-transaction database when the first actual offer is made to or by the prospect. Stored information on pending transactions allows managers to monitor sales transactions as they are taking place, enabling them to insert themselves into the sales process if a deal begins to turn sour; and

(5) control-record information, which can provide, for example: data on financing and leasing plans; data on taxes and fees that would apply to the particular sale; information on other products or services frequently sold in conjunction with the desired purchase item, information on commission rates that apply to various components of the sale, or the sequence and content of each step in the sales process.

External Data Stores

Useful information may be contained within databases at one or more external data stores **115** such as manufacturers, credit bureaus, and credit-granting institutions. For example, vehicle manufacturers commonly maintain real-time updated databases of vehicles on order, in production, in transit, and in the inventories of all dealerships nationwide. When a situation is encountered where the dealership does not have on hand the vehicle that the prospect desires, the seller can access this external data store from a handheld computer to see if a suitable unit exists somewhere in the distribution system.

These external data stores may be accessed directly from the handheld unit or through the communications network to the central computer that has a conventional modem attachment to the telephone network to the vehicle manufacturer.

The Hand-Held Computer Unit

The handheld computer unit **110**, referred to as a handheld unit, may be a custom designed unit or a suitably programmed subnotebook computer or personal digital assistant (PDA). It may be a stand-alone unit; or it may be designed for use as a smart wireless terminal in a larger system including a central computer unit **105**; or it may be designed to operate in either stand-alone or smart-terminal mode at the user's option.

A) WIRELESS LINK **120**: The handheld unit **110** may have a conventional communications interface or link **120** to the central computer unit **105** or to other handheld unit(s) **110**, preferably a wireless link **120** to enable user mobility. The wireless link **120** may take the form of, e.g., a radio modem, an infrared beam, or similar devices.

B) INPUT DEVICE: The handheld unit **110** has a conventional input device operable by the seller for recording data about the prospect, along with suitable conventional programming for managing the input process. The input device

may take the form of, e.g., a keyboard; a touchscreen such as those found on many PDAs; a pointing device such as a mouse, trackball, or J-stick; or a voice-recognition unit. The input device may also have an audio recording input capability.

C) TRANSMISSION OF PROSPECT DATA: The handheld unit **110** may include programming for transmitting prospect data to the central computer unit **105** or to other handheld units **110** via the communications link. The prospect data may be transmitted to the central computer unit **105**, but may also be retained locally at the handheld unit **110**.

D) SALES INFORMATION REQUESTS: The handheld unit **110** includes programming for interrogating the sales-information data store to obtain information requested by the seller. This may include, e.g., inventory information to determine which cars are in stock or can be obtained quickly.

E) DISPLAY: The handheld unit **110** includes a conventional display (e.g., an LCD display) and suitable programming for displaying requested sales information to the seller. As noted above, display of the requested information may be contingent on the seller having entered all required prospect data and complying with steps in the sales communications process that is required by sales management.

F) LOCAL DATA STORE: The handheld unit **110** may include a local data store (e.g., readwrite memory or "RAM," flash memory, or a hard disk drive) for locally storing some or all of the sales information data store. This permits the handheld unit **110** to operate independently of the central computer unit **105** if desired, advantageously reducing wireless communications traffic and permitting use of the handheld unit **110** if the central computer or wireless communications link are inoperable.

G) EXTERNAL DATA STORE: The handheld unit **110** may access databases at external locations such as the external data store **115** via direct communications or by communications over the wireless link **120** to a central computer **105**, which has a conventional communications link over telephone lines to the external data store. The communications link may be a modem-type link or a direct digital connection, e.g., an IDSN line, a T1 or T3 line, etc.

Sales Communication Process

A) SPECIFIED SEQUENCE: The handheld unit **110** includes programming to prompt the seller to perform a specified sequence of steps in a desired sales communication process. The programming may take the form of pre-stored scripts, in a suitable macro-like script language, that are conventionally interpreted by an interpreter (or alternatively are conventionally compiled into executable form) and which, when executed by the handheld unit **110**, cause the handheld unit **110** to display appropriate messages on a display.

Different scripts may be used for different sales contexts. For example, a script for an inperson visit by a prospect may prompt the seller to handle the encounter differently than for a telephone inquiry.

The sales communications process(es), and thus the script(s), will normally include obtaining prospect data and recording it in a data store in the handheld unit **110**; the scripts preferably take into account the prospect data as it is entered by the seller. For example, if the initial prospect data entered by the seller indicates that the prospect is young, then the programming script may prompt the seller to ask whether the prospect would be interested in a first-time-buyer financing package and to record that prospect data.

B) PRODUCT PRESENTATIONS: The handheld unit **110** may include programming to display a series of scripted product features and benefits. These scripts may vary based upon the particular product that the prospect is interested in. A com-

prehensive product presentation is key element of a successful sales process.

C) RECORDING OF DATA: For greater usefulness of the system, the seller is asked to record the prospect's personal information such as name, address, etc., early in their meeting. As the seller records the information into the handheld unit **110**, the information may be conventionally transmitted (on a real-time basis or periodically in a batch) to other handheld units **110** or to the central computer unit **105** for storage in the appropriate database for use in a conventional sales prospect follow-up system. Thus, no matter how the sales transaction ends, the dealership will always have a record of the prospect's visit and can follow-up the visit with a letter or phone call.

Human factors are a disincentive to comply with recording of prospect data: Since sellers are evaluated on their sales efficiency, they have a disincentive to record data on prospects that do not purchase since this would reflect negatively on their sales efficiency ratios. Historically for this reason sellers in this situation have done a very poor job of collecting prospect data in spite of its obvious usefulness to the dealership.

D) INCENTIVES TO COMPLY WITH SALES PROCESS: Notably, the sales-information-request programming of the handheld unit **110** includes one or more program routines to deny access by the seller to the sales-information data store and to the remote communications links to the external data sources, and to display an appropriate reminder message, if the seller has not complied with the specified steps in the sales process. This gives the seller a large incentive both to comply with the process and to record data as required by the process. For example, the program routines may prevent the handheld unit **110** from accessing the vehicle-inventory information database if all required prospect data has not been entered. Alternatively, the routines may permit the handheld unit **110** to obtain the requested data from the sales information data store, but then not permit the data to be displayed until all required prospect data has been entered. As with many of the program routines described for the handheld unit **110**, these program routines may equivalently be located in and control the central computer unit **105** to prevent that unit from transmitting requested data to the handheld unit **110**.

E) TIME STAMPS: The illustrative handheld unit **110** includes suitable conventional programming for recording time stamps to identify the time and/or duration of performance of respective steps in the desired sale communication process. The time stamp records are used to record the actual time (either clock time or elapsed time during the sales encounter) at which the seller records specified information. This permits sales management to confirm with reasonable confidence that the seller is in fact performing the appropriate steps in the sales communication process instead of, e.g., recording fabricated or "bogus" data all at once. For example, if the manager sees that a certain seller's tour of the dealership facilities with a prospect lasted only 15 seconds, the manager knows the seller has circumvented that step in the process and can counsel him or her. The time stamps can both be recorded locally at the handheld unit **110** or uploaded to the central computer unit **105** via the communications link for statistical analysis of seller performance. Alternatively, the time stamp records can be created at the central computer unit **105** as prospect data and other data are transmitted by the handheld unit **110**.

F) EXTERNAL CHECKS ON PROCESS COMPLETION: Suitable programming can be included in the handheld unit **110**, the central computer unit **105**, or both, for receiving and pro-

cessing a signal from an external device indicating that a specified step in the sales communication process has been completed. The external device may be, e.g., a sensor in an vehicle key storage machine that signals when a particular seller, identified by a password or an electronic keycard (similar to a bank automated teller machine card), checks out the keys to a car for a test drive. Other external devices may be advantageously utilized to verify the physical location of the seller at a particular time, thus serving as an additional check on the seller's compliance with the specified sales communication process.

Similarly, programming can be included for sending a signal to a gate controller to open a vehicle access gate. The seller, when driving out of the dealership parking lot for a test drive, thus can use the handheld unit **110** to send a signal to the gate controller, either directly or via the central computer unit **105**. The handheld computer **110** logs the fact that the seller is leaving the premises on a test drive with the prospect in question. Again, this verification of the seller's physical location at a particular time serves as a check on the seller's compliance with the sales process.

G) SELECTIVE AUDIO RECORDING: Conventional hardware and suitable programming may be included in the handheld unit **110** for selective audio recording of a conversation between the seller and the prospect. Selective audio recording of the actual conversation between the seller and the prospect can be useful. For example, Saleswoman A may be known to perform well in obtaining initial prospect wants and needs. Audio recording of this portion of her conversation with the prospect may be deemed unnecessary and thus can be skipped. On the other hand, Salesman B may be weak in this area; when he indicates on the handheld unit **110** that he is in this phase of the desired sales communication process, the handheld unit **110** may automatically commence audio recording until the next phase of the conversation. Sales management is then able to selectively listen to the actual sales process as it progressed and counsel the seller on sales techniques. If required by privacy laws, the handheld unit **110** may be programmed to play an audible message on commencement of recording, such as "to help ensure quality service, this conversation may be monitored or recorded."

H) FINANCING ASPECTS: The handheld unit **110** may include programming for transmitting identifying information about the prospect and a creditworthiness inquiry to a financial institution computer **125**, and for receiving and processing a creditworthiness report from that computer. If the handheld unit **110** includes an input device that can store a signature digitally, then the prospect can be asked to "sign" an authorization granting the dealership permission to access the user's credit history. The input device may be a conventional pen- and touch-screen interface of the kind found in some PDAs; a similar device of the kind found at some cash registers for credit card authorizations; or the like. Access to the financial institution computer **125** may be via direct link or may be through a conventional data link such as a modem controlled by the central computer unit **105**. The financial institution may be a credit bureau or an actual financing source. In the latter case, the financing source may perform its own credit check and make a preliminary creditworthiness determination to be transmitted back to the seller. This in turn helps the seller qualify the prospect, i.e., to determine the price range of the vehicle for which the prospect is likely to be able to obtain financing.

I) COMPUTATION OF FINANCE TERMS: The handheld unit **110** may include conventional programming enabling the seller to use it as a financial calculator for calculating, e.g.,

lease payments, loan payments, and the like. As the sales process progresses, the prospect data, creditworthiness report, and finance terms may be transferred to another handheld unit **110** or a central computer system **105** for finalization of paperwork or for negotiation purposes as described below.

J) REAL-TIME NEGOTIATION: The handheld unit **110** programming may include routines to permit the seller to send offers to and counteroffers to other handheld computers **110** or the central computer unit **105**. A sales manager or similar person may read and respond to these exchanges, e.g., using another handheld unit **110** or a terminal **130** attached to the central computer **105**. By eliminating most of the seller's trips back and forth from the prospect to the sales manager's desk, much of the time needed to consummate a sale is reduced. This reduction of time spent in the negotiating process is a vital element in improving sales efficiency since if this process becomes extended, the prospect is increasingly likely to have misgivings and decline to consummate the sale. The capacity for real-time negotiation becomes increasingly valuable in situations of high activity (like a Saturday), when there are a large number of sellers per sales manager, when the average experience level of sellers is low, when there is a large number of sellers working at a single location, or when the physical distances at a given location between sellers and sales management are large.

K) REAL-TIME SALES PROGRESS DISPLAY: The programming of the handheld unit **110** may include routines for real-time computation and display of sales progress information applicable to the transaction. For example, the likelihood of closing the sale may be estimated and displayed on the handheld unit **110** by comparing factors such as (a) the length of time that the prospect has consented to spend with the seller during each step of the sales process, and/or (b) the number of steps in the process that have been completed, with historical data on previous sales process outcomes (e.g., stored in the sales information data store) for that dealership, that city, etc. This likelihood may be displayed in a variety of ways (e.g., a percentage number, a gas-gauge indicator, etc.) to show the likelihood of closing the sale going up as each step is completed. This encourages the seller to perform each step thoroughly, taking sufficient time to communicate the desired information to the prospect.

L) REAL-TIME SALES COMMISSION DISPLAY: The programming of the handheld unit **110** may include routines for real-time computation and display of the commission that would be paid to the seller if the sale were to be consummated on the specified terms. This can serve as a powerful sales motivator for the seller.

M) COMPARATIVE RANKING AMONG SELLERS: The handheld unit **110** may also be programmed to display a list of sellers at the dealership, ranked by performance for a given period, e.g., by sales achieved in a given month. This constantly updated real-time display of sales rankings also can serve as a sales motivator for sellers.

N) DETERMINATION OF PARTICULAR PROSPECT INTERESTS: The programming and data structures of the handheld unit **110** may also be designed such that answers to scripted questions provide an indication of the prospect's general interests (sometimes referred to here as "motivations") or specific interests (sometimes referred to here as "hot buttons"). For example, the prospect's responses to questions may indicate that the prospect is generally interested in safety. Other typical prospect motivations include performance, economy, and style, to name but a few examples. Moreover, the prospect may be specifically interested in features of a car such as air bags, trailer towing

packages, etc. Some or all of these various interests may have different degrees of importance to different prospects.

If a prospect's answers to questions (alone or in combination) indicate the presence of one or more general interests or specific interests, that fact(s) is noted by setting one or more flags within an appropriate data structure, either within the handheld unit **110** or within the central computer unit **105**. The handheld unit **110** then prompts the seller to ask specific additional scripted questions or make specific additional comments related to that interest to help focus the discussion. The handheld unit **110** thus helps the seller do what an expert seller likely would do intuitively.

This can be implemented in a variety of ways. For example, the programming of the handheld unit **110** may be designed so that the required flags are maintained in a suitable data structure in memory within the handheld unit. The term "flag" is used here to include values of specific data variables. For example, if a prospect's responses indicate that she has two children, ages 4 and 2, the fact that she has children and their respective ages may be recorded in appropriate variables and used as flags concerning safety as a motivation and for fold-down child seats as a possible hot button. Then again, if the prospect's answers indicate that she affirmatively does not plan to use the car to carry her children (e.g., she is buying the car for her college-bound oldest child), the fact that she has younger children may be overridden.

The overall logic of the programming in this regard is quite simple: At one or more appropriate points in the encounter between the seller and the prospect, if a flag is set indicating that the prospect has a particular motivation (as determined, e.g., by the prospect's responses to particular questions), then the seller is prompted to provide information or ask questions relevant to that motivation. For example, if a flag is set indicating that safety is a motivation for the prospect, then at one point in the encounter the seller is prompted to mention the fact that the vehicle has side air bags; at another point the seller is prompted to mention the vehicle's built-in, fold-down child seats; and so on.

Motivation switches and hot buttons of this kind can also be implemented in whole or in part in the central computer unit **105**. For example, the central computer unit may determine from the prospect's ZIP code that the prospect lives in an area in which mini-vans are popular. In response, it may prompt the seller, via the handheld unit **110**, to suggest to the prospect that "you know, a lot of people in your neighborhood are buying this model of mini-van."

As would be apparent to one skilled in the art, conventional programming methods can be used to determine a prospect's motivations and hot buttons. Thus, the actual implementation of the required programming is immaterial here.

O) SELECTIVE PRESENTATION OF PRODUCT OPTIONS: Many products sold to the public include various options. For example, cars, trucks, and similar vehicles often come with options such as air conditioning, a trailer-towing package, built-in child seats, etc. A seller will frequently make a sales presentation about a specific example of a product, e.g., a specific car or truck on the lot. It may be desirable for the seller to talk only about options actually installed on that specific car or truck. An experienced seller is likely to know this. A novice seller, on the other hand, may not be aware which options are installed on the particular car or truck (or may not even be aware of the extent of the available options).

The programming and data structures of the handheld unit **110** therefore may be designed to be sensitive to the actual

options installed on a particular vehicle. The vehicle identification may be obtained and inputted into the handheld unit **110** in any convenient manner, e.g., by selecting from a menu of available vehicles having specified characteristics or by direct entry of the factory-applied vehicle identification number (VIN). Information about the options installed on that particular vehicle may be stored in the sales-information data store as described above.

The programming for the sales communication process can then easily be designed to prompt the seller to talk at a suitable point about the specific options already installed on the vehicle, e.g., in response to the motivation switches and hot buttons described above. The script for the sales communication process can include suitable remarks for the seller to make, e.g., "this particular car has the new high-performance engine already installed." Additional information about the option can be displayed if desired, either automatically or in response to a command inputted by the seller.

The programming and data structures of the handheld unit **110** can also be designed to provide the seller with a list of options that could be installed on that vehicle if desired. In that way, if the prospect indicates interest in other options, the seller can respond with an appropriate list.

If the prospect indicates interest in an option not already installed on that vehicle, the handheld unit **110** may identify from the sales-information data store a vehicle that does already contain that option and display that information to the seller.

If the prospect is trying to decide which specific vehicle he or she prefers, the handheld unit **110** may display a compare-and-contrast list of options for each vehicle, e.g., in table form.

It will be appreciated by those of ordinary skill having the benefit of this disclosure that programming of these option-sensitive features is conventional. A simple implementation entails providing, in the sales-information data store, a data structure with option information about each specific vehicle on the lot. Depending on the implementation, the data structure may include a flag indicating the presence of an option and/or more detailed information about the option. The portion of the programming that causes display of a script on the handheld unit **110** simply checks the data structure to determine whether a particular option is present and modifies the script accordingly (possibly depending on other factors such as whether the prospect has expressed any interest in the option).

P) INCORPORATING PROSPECT INFORMATION INTO CUSTOMIZED SCRIPTS: The data collected about the prospect during the sales presentation can be used to customize the script displayed to the seller through simple parameter substitution. The customized script can reflect information such as the prospect's name, spouse's name, children's names, current vehicle owned, mileage on current vehicle, etc. This may help the inexperienced seller build a rapport with the propsect in the same way that experienced sellers do. The customization can be readily implemented in conventional fashion in the programming of the handheld unit **110**, the central computer unit **105**, or both, as convenient.

The simplest example of such customization is probably the parameterized substitution of the client's name into the script. Some sellers believe that use of the prospect's name is a key factor in building a rapport with the prospect. Suppose that the seller has input data into the handheld unit **110** (or retrieved it from the sales-information data store) indicating that the prospect is female, she is a physician, and her last name is Jones. At an appropriate point the script

might include a reminder to work the prospect's name into the conversation. The unsubstituted script might read "<Title><Last_Name>, if you have time, let's take a test drive." As displayed to the seller on the handheld unit **110**, it would read "Dr. Jones, if you have time, let's take a test drive."

As a more sophisticated example, suppose that the prospect, Dr. Jones, has said that she has a one-year old son John and that she is interested in a particular model of mini-van because it has built-in child seats. If the script is option-sensitive as described above, at an appropriate point it can suggest that the seller make a comment such as "You see the child seats back here they're designed for children three months to five years old, so <Child_Name>should be able to use it till he's big enough to go without one." As displayed to the seller on the handheld unit **110**, the script reads". . . so John should be able to use it till he's big enough to go without one."

Q) "RECAPPING" SCRIPT SEGMENT: One skill of an experienced seller is the ability to remember those features of a product that aroused the prospect's interest during the sales communication process and to recap them orally during the closing stages of the process. To the extent that the seller provided data to the handheld unit **110** indicating the prospect's interest in specific options (or if the data was already present in a sales-information data store), then upon a suitable command from the seller (possibly in response to a reminder prompt from the handheld unit **110**), a recap list of those options is displayed on the handheld unit **110**. Alternatively, the handheld unit **110** can display the recap list automatically when the information available suggests that the sales communication process has entered a specified phase.

R) "MANAGER HELP" BUTTON: For any given prospect, an inexperienced seller is likely to encounter difficulties at some point. The seller might not be saying the right things at the right time. There might be a personality conflict, mild or severe. There are undoubtedly dozens of reasons why any given sales communication process might go badly for an inexperienced seller.

Consequently, inexperienced sellers are trained to go get their managers if they sense that they are losing control of the sales communications process with a given prospect. Unfortunately, this often entails a seller asking the prospect to wait while the seller finds the manager. As often as not, the prospect seizes the opportunity to depart gracefully—resulting in a lost sales opportunity. This can cause inexperienced sellers to be reluctant to leave the prospect to ge the manager. In those cases where an experienced sales manager can be discretely brought into the sales communication process, however, there is a reasonable chance that the situation can be turned around and the prospect converted into a buyer.

To address this situation, the handheld unit **110** may include a "Manager Help" button. The Manager Help button is very similar in concept to the "panic button" found on handheld units available for some home-security systems—a householder can keep the handheld unit on or near his or her person; pressing the panic button transmits a signal to the security service, which sends someone to investigate.

The Manager Help button may be conventionally implemented in hardware or, preferably, in software as an icon or menu choice on the display of the handheld unit **110**. When the seller "hits the button" (literally or figuratively), the handheld unit **110** signals the central computer unit **105** that a manager's assistance is required. The central computer

unit **105** then generates an appropriate message on, e.g., a terminal in the sales manager's office. The message may include information such as the seller's identity and a summary of what has transpired in the sales communication process with that prospect. The sales manager can then "stop by" and very naturally introduce him- or herself into the sales process.

The Manager Help button can be implemented so that pressing the button brings up a menu or a series of icons indicating different kinds of available assistance. The available assistance might include items such as "Soft drinks" (resulting in someone coming to take the prospect's drink order), "Service department," (resulting in a service-department representative coming to join the conversation), and the like. One or more of these items can be in addition to, or in lieu of, the manager assistance described above.

s) CACHING OF SCRIPTS, ETC.: If a suitably fast wireless link is available between the handheld unit **110** and the central computer unit **105**, then the handheld unit can be programmed to interact with the central computer unit on a real-time basis while in use and while in range of the central computer unit. Thus, when a seller is using the handheld unit **110** in range of the central computer unit, it effectively acts as a wireless terminal for the latter unit.

In that way, the seller uses the most current version of the scripts, sales information, etc. (referred to here as the "information load" of the handheld unit), as is practicable. That means, for example, that the seller will have up-to-date information about the vehicle inventory; he or she will not attempt to sell a prospect a vehicle that has already been sold, nor attempt to show a vehicle that is already being test-driven by another prospect (assuming that such information is kept current in the central computer unit **105**).

But the handheld unit **110** is designed to be used in a mobile environment. There likely will be times when the handheld unit is out of range of the central computer unit **105**, e.g., if the seller is on a test drive with a prospect.

To address that problem, the information load may be periodically downloaded from the central computer unit **105** into storage (preferably nonvolatile storage such as a hard disk drive or nonvolative RAM) on the handheld unit **110**. That makes the information load available for use by the seller even if the handheld unit loses contact with the central computer unit. In concept, such downloading is much like the "caching" of Web pages, graphics, etc., by browsers such as Microsoft's Internet Explorer and Netscape's Navigator, so that the Web pages and graphics can be viewed even if the user does not have a current connection to the Internet.

The downloading operation is preferably performed automatically upon startup of the handheld unit **110**, e.g., through the use of an AUTOEXEC.BAT file or a Windows 95 Startup program. Such downloading, when successful, ensures that the handheld unit gets a current information load.

t) DATA COMPRESSION: If desired, the downloading may use data-compression and—decompression techniques to speed up the data transmission. That is, the central computer unit **105** may use any of a variety of conventional data-compression algorithms to substitute short strings of characters in place of long strings. For example, in the so-called dictionary approach, the central computer unit **105** would transmit comparatively short codes in place of longer strings of data characters; the handheld unit **110**, using a compatible dictionary, would translate the codes back into the original longer strings of data characters. (The programming of the handheld unit **110** can be designed to store the data in compressed form and decompress on an as-needed basis

instead of decompressing it immediately upon receipt.) Well-known examples of dictionary-based data compression include those pioneered by Lev and Zimpel as well as several variations on the basic LZ approach such as Lev-Zimpel-Welch (LZW); in these examples, dictionaries are built up "on the fly" to match the actual data transmitted.

u) REFRESH-TYPE UPDATING: If the information load is downloaded into nonvolatile storage in the handheld unit **110**, the downloading operation can be conventionally designed to function in the well-known "refresh" mode. That is, the central computer unit **105** determines which portions of the desired current information load are already present in the handheld unit **110** and downloads only those portions that are not already present. The refresh operation may be performed in any convenient manner. One simple approach is for the central computer unit **105** to send a signal to the handheld unit **110** directing the handheld unit to provide a directory listing of the separate data files making up its information load, including the dates and times of each file. That information can be used by the central computer unit to determine which files should be updated. Alternatively, conventional record-level marking or tagging can be used to determine which if any record(s) in a database of scripts, sales information, etc., are candidates for updating.

v) PERIODIC UPDATING OF DATA: After initialization of the information load, selected portions thereof may be updated from time to time to reflect ongoing changes in the sales information data store. For example, a car dealership may refresh its handheld units **110** by downloading updated data whenever a specific vehicle is sold, so that other sellers will no longer attempt to test-drive that vehicle; or whenever new vehicles are added to the inventory. The update operation may be performed on a periodic basis, e.g., once per hour, once every four hours, etc. It may also be performed on an as-needed basis, e.g., when an inventory item (such as a specific vehicle) is sold or is added to the inventory. The update operation could be performed in some combination of periodic and as-needed basis. The update operation may be initiated by each handheld unit **110** or by the central computer unit **105**.

Description of Specific Illustrative Embodiment

HARDWARE: One possible embodiment of the handheld unit **110** is the Fujitsu Stylistic 1000 RF, shown in FIG. 2 identified by the reference numeral **200/110**, running the Microsoft Windows 95 operating system. In implementations involving outdoor sales work (e.g., car dealerships), the available transflective monochrome liquid-crystal display (LCD) option is preferred for the screen 205 for greater visibility in sunlight. This model of the Stylistic 1000 includes an antenna **210** for a spread-spectrum radio; if a different model without a built-in wireless link is used, then a separate unit such as an ARLAN wireless LAN adapter can be inserted into the PCMCIA slot (sometimes called the PC Card slot) on the handheld unit. Data entry can be accomplished with a stylus 215. The unit advantageously includes a hot-swappable battery, permitting the battery to be changed without powering down the unit. At this writing, more detailed information is available at http://www.fpsi.fujitsu.com/products/st10RF.htm.

a) SOFTWARE—SCREEN DISPLAYS, DATA ENTRY: FIGS. **3** through 21 show examples of screen displays and data entry fields. The examples are from an experimental prototype of the invention designed for use in car dealerships. The Figures show fictitious prospect data in the displays. It will be appreciated by those of ordinary skill having the benefit of this disclosure that other screen arrangements are possible and, in other contexts, may be preferable to the ones shown

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here; for example, an implementation of the invention for use in a jewelry store obviously will be different from the car-dealership illustration shown in the drawings. Which specific screen arrangement to use in a given context is a matter of design choice for the artisan.

As seen in FIGS. **3** through **20**, the prototype display- and data-entry screens for a given prospect are conventionally organized by representations of notebook tabs shown at the bottom of each screen. A given screen can be brought up on

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the display **205** of the handheld unit **110** by clicking with the stylus **215** on the appropriate tab. As is customary for such a display organization, the tab for screens not actually being viewed may be shown in a different color or shading than the tab for the screen being viewed. The specific prototype display/data entry screens shown in the Figures are described in Table 1 below; three-letter codes correspond to the codes at the lower right portion of various (but not all) screens.

TABLE 1

DESCRIPTION OF SELECTED FIGURES

FIG.	Code	Title	Description
FIG. 3	INF	Prospect info	Basic information about the prospect, e.g., name, address, phone number
FIG. 4	PER	Prospect personal data	More detailed information about the prospect such as Internet address, nickname, hobbies
FIG. 5	COB	Co-buyer data	Information about a co-buyer such as a husband or wife
FIG. 6	WAN	Prospect wants	Details about what the prospect wants in a vehicle
FIG. 7	TRA	Trade-in	Information about the car the prospect wants to trade in
FIG. 8	APP	Trade-in appraisal	Trade-in appraisal information
FIG. 9	SEL	Vehicle search (Attributes and Price/Payment tab)	A form for searching the sales data store to locate vehicles matching specific criteria
FIG. 10	SEL	Vehicle search (Options tab)	A form for searching the sales information data store to locate vehicles matching specific criteria
FIG. 11		Vehicles found	A list of vehicles found in the sales information data store that match the search criteria, along with detailed information about a highlighted vehicle
FIG. 12	VBH	Selected vehicle	Information about a specific vehicle; includes a "Hold for salesman" button in the lower right corner to place a temporary hold on the vehicle
FIG. 13	CBI	Credit bureau inquiry	Displays information to be sent to a credit bureau. Includes a "Send" button in the lower right corner, which causes a credit inquiry signal to be transmitted.
FIG. 14	OFF	Prospect offer	A screen showing the current status of offers and counteroffers.
FIG. 15	SOL	Sold	Information about a specific vehicle sold to a specific prospect
FIG. 16	DBL	Delivered	Information about a specific vehicle delivered to a specific prospect
FIG. 17		Select a vehicle position	A graphical touch-screen prompt that brings up script prompts with suggested points for the seller to discuss about the area of the car touched (see FIGS. 18, 19). If the sales information data store contains enough specific information about the various makes and models of vehicles, additional touch-screen prompts can be "nested," e.g., touching the "Interior" region brings up a list (or diagram) of interior features such as air conditioning, cruise control, etc.
FIG. 18		Speed Control	A sample script prompt; includes three navigation buttons Next, Previous, More.
FIG. 19		Speed Control	Another sample script prompt.
FIG. 20	BEB	Sales Manager	A screen brought up when the seller wants to close out the prospect record. Data fields marked by an asterisk are the minimum data that the seller should collect and record to be able to return to the main menu. The "beback" date and time fields indicate when the prospect has indicated s/he will return.
FIG. 21			An example of a dialog box with a suggested script and three buttons for the seller to choose from. Includes two navigation buttons, Top and Previous, at the top right of the dialog box.

b) SOFTWARE—SCRIPT BUTTONS: Many of the screens have two rows of "buttons" at the top of the screen (with some buttons grayed out in some of the screens). Clicking on a button in the second row causes the handheld unit **200/110**

to begin running a script for the corresponding phase or "step" of the sales presentation process as described in Table 2. An asterisk may be displayed in one of these step-related buttons to indicate that the seller has worked through enough

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of the script for the step in question that the step can be
marked as complete. For example, in FIG. **3**, the GRT button

screen that is currently being displayed (e.g., the Prospect
Info screen shown in FIG. **3**).

TABLE 3

SCRIPT CONTENTS

SCRIPT TEXT	Text to be displayed in the dialog box to prompt the seller to say specific things to the prospect. For example, in FIG. 27, at the script record labeled DEM 0100, the seller is prompted to say "Let me start the car, and I'll show you more about the interior of this vehicle."
ANSWER	The text of zero or more buttons, menu choices, etc., to be displayed as part of the dialog box so that, e.g., the seller can indicate the prospect's response to the SCRIPT TEXT. For example, in FIG. 27, three potential answers are displayed: OK, No time, and Not buying.
GOTO	Indicates that, when this script record is executed, a different screen is to be displayed "under" the dialog box. For example, in FIG. 36, script record SEL 0020 contains the entry SEL in the GOTO field. This indicates that when this record is executed by the handheld unit 200/110, the "Vehicle search" screen shown in FIG. 9 (whose three-letter code is SEL) is displayed under the dialog box.
PUT DATA, FIELD	Specific data values to be entered in specific fields in the sales-information data store. For example, in FIG. 38, if the seller clicks on the answer indicating that the prospect's trade-in is being financed by FMCC, then the value "FMCC" is assigned ("put") to the field TRADELIENNAM (trade-in lienholder name).
STEP, SEQ	The next record of the script to be executed (which can vary depending on which prospect response is selected). For example, in FIG. 27, if the prospect's answer to "Let me start the car . . ." is "OK," then the handheld unit 200/110 executes script record DEM 0140, which suggests that the seller "[t]ake the time to explain or review one or more of the interior features covered in the product presentation."
*(asterisk)	Indicates that, when the script record in question is complete, the entire "step" can be marked as complete. For example, in FIG. 36, the "Y" entries in script records SEL 0020, 0030, and 0040 indicate that if any of these three records is executed, the entire Vehicle search step in the sales presentation process, whose three-letter code is SEL, can be marked as complete (see, e.g., the asterisk in the SEL button shown at the top of FIG. 12).

has an asterisk to show that the Greeting step has been sufficiently completed.

The script (reproduced in FIGS. **22** through **70**) prompts the user to say certain things to the prospect and to enter certain data at specific points in the sales presentation process; the data entered are displayed on the screens described above. Many but not all of the three-letter codes for the scripts are the same as the three-letter codes for the screens listed in Table 1.

TABLE 2

SCRIPTS IN PROTOTYPE SELLER PROCESS

GRT	Greeting the prospect
WAN	Determining the prospect's wants
SEL	Selecting an actual vehicle
PRO	Product presentation (a detailed product-presentation script with prompts for discussion of features found in specific vehicles is in the file SCRIPT.RPT in the microfiche appendix).
DEM	Demo of a vehicle
TRA	Trade-in
SBR	Service department (often user-defined to be specific to the dealership)
WRI	Write up the order (offers and counter-offers)
SOL	Update the information on the vehicle sold
DLR	Dealer-defined, e.g., "why should you buy your car here" information

The script, shown in FIGS. **22** through **70**, can be thought of as a flowchart expressed in words. Each "line" of the script, referred to as a record, contains information as described in Table 3 below. Execution of the script by the handheld unit **200/110** causes a dialog box (see, e.g., the "Welcome to ABC Motors. How may I assist you today" dialog box shown in FIG. **21**) to be displayed "over" the

c) SOFTWARE—OTHER BUTTONS: Referring to FIG. **3** as an example, the top row of buttons includes the buttons Show Script; Close Prosp[ect], and Manager. The Show Script button causes the handheld unit **110** to resume running a script that was suspended by the seller (using a Hide Script button, not shown). The Close Prosp[ect] button signifies that the sales presentation has ended, either with or without a sale. The Manager button causes a signal to sent to summon a sales manager as described in Section 4.5(r) above.

d) SOURCE CODE: It will be appreciated by those of ordinary skill having the benefit of this disclosure that much more detail about the operation of the prototype can be found in the source code reproduced in the microfiche source code appendix. The code is written to be compiled with the Microsoft® Visual C++ compiler.

Other Remarks

Use of the system described above helps management enforce the desired standardization of the sales process. The seller cannot advance through the prescribed sales process until he or she has completed all prior steps. In this way, management is assured that each prospect receives the treatment that has been deemed most effective in making a sale.

For example, the handheld unit **110** ordinarily allows the seller to retrieve and view sales information from the sales information data store for the benefit of the prospect (e.g., to determine whether a particular model is in stock). However, if the seller has not recorded the prospect's personal information such as name, address, and telephone number, the system will not allow the seller to retrieve that information. Thus, unless the seller follows the prescribed program, he or she is effectively prevented from proceeding. However, if

the seller progresses through the prescribed steps, the hand-held unit **110** may inform the sales management of each step completed successfully. In this way, management keeps abreast of which transactions have been dragging in critical stages, when management assistance might be useful.

The system provides other benefits besides adherence to the sales process. New sellers are easily trained on the job: once they learn to use the sales machine, it gives them a step-by-step script to follow, taking the guesswork out of the learning process.

Sellers are prompted through a thorough product presentation of features and benefits. These product presentations are specific to the product that the prospect desired to purchase and are tailored to address both the general and specific interests of the prospect.

Also, management now has an accurate picture of each seller's sales efficiency (ratio between number of sales completed per number of prospects seen). In a paper based system, sellers had a disincentive to record the visits of prospects who made no purchase, so management did not get any real idea of how well each seller was performing.
Program Storage Device

As noted above, any of the foregoing variations may be implemented by programming a suitable general-purpose computer having appropriate hardware such as a microprocessor, memory, and a communications device such as a modem (preferably wireless for the handheld device **110**). The programming may be accomplished through the use of a program storage device readable by the computer and encoding a program of instructions executable by the computer for performing the operations described above. The program storage device may take the form of, e.g., one or more floppy disks; a CD ROM or other optical disk; a magnetic tape; a read-only memory chip (ROM); and other forms of the kind well-known in the art or subsequently developed. The program of instructions may be "object code," i.e., in binary form that is executable more-or-less directly by the computer; in "source code" that requires compilation or interpretation before execution; or in some intermediate form such as partially compiled code. The precise forms of the program storage device and of the encoding of instructions are immaterial here.

It will be apparent to those of ordinary skill having the benefit of this disclosure that numerous variations are possible from the illustrative embodiments described above. Accordingly, it is the claims below and not the illustrative embodiments that measure the exclusive rights claimed in the invention.

What is claimed is:

1. A sales support computer comprising:
   (a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect; and
   (b) means for displaying a series of prompts to the seller, as a function of the prospect data, to prompt the seller to perform steps in a desired sales communication process during an encounter with the prospect in response to the at least one particular interest of the prospect, including one or more prompts to the seller to describe orally to the prospect one or more specific features and benefits of a product or service.

2. The sales support computer of claim **1** wherein the sales support computer is of a size suitable for the computer to be held in the seller's hand.

3. The sales support computer of claim **1** wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

4. The sales support computer of claim **1** wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

5. The sales support computer of claim **1**, wherein the prompting to perform specified sequence of steps includes prompting the seller to say specific prospect-related information aloud.

6. The sales support computer of claim **5**, wherein the specific prospect-related information comprises the prospect's name.

7. The sales support computer of claim **5**, wherein the specific prospect-related information comprises information about a product option in which the prospect has indicated an interest.

8. The sales support computer of claim **5**, wherein the specific prospect-related information comprises a recap list of information about product options in which the prospect has indicated an interest.

9. The sales support computer of claim **1**, further comprising:
   c) means for prompting the seller with a script of product features and benefits.

10. The sales support computer of claim **1**, further comprising:
   c) means for displaying a list of options available for a specific product.

11. The sales support computer of claim **1**, further comprising:
   c) means for simultaneously displaying information about the availability of one or more specified options for two or more specific products.

12. The sales support computer of claim **1**, further comprising:
   c) means for displaying a table of option availability for two or more specific products.

13. The sales support computer of claim **1**, further comprising:
   c) means for summoning assistance for the seller.

14. The sales support computer of claim **1**, further comprising:
   c) means for retrieving information from an external data store.

15. The sales support computer of claim **14**, wherein the retrieved information comprises consumer credit information.

16. The sales support computer of claim **1**, further comprising:
   c) means for retrieving and displaying sales information from a sales information data store; and
   d) means for preventing the seller from perceiving sales information from the sales information data store unless the seller records the prospect data.

17. The sales support computer of claim **1**, further comprising:
   c) means for retrieving and displaying sales information from a sales information data store; and
   d) means for preventing the seller from perceiving sales information from the sales information data store if the seller does not comply with the desired sales communication process.

18. The sales support computer of claim **1**, further comprising:
   c) means for accessing an external data store, and
   d) means for preventing the seller from retrieving information from the external data store if the seller does not comply with the desired sales communication process.

19. The sales support computer of claim **1**, further comprising:

c) means for recording the duration of performance of respective steps in the desired sale communication process.

20. The sales support computer of claim **19**, wherein the means for recording the duration of performance of respective steps in the desired sales communication process comprises means for recording time stamps identifying the respective times of performance of the steps.

21. The sales support computer of claim **1**, further comprising:

c) means for transmitting a creditworthiness inquiry about the prospect to a financial institution, and

d) means for receiving a creditworthiness report on the prospect.

22. The sales support computer of claim **21**, further comprising:

e) means for recording a representation of the prospect's signature, and

f) transmitting a representation of the prospect's signature to the financial institution.

23. The sales support computer of claim **1**, further comprising:

c) means for transmitting a sales offer and means for receiving a response to the offer.

24. The sales support computer of claim **1**, further comprising:

c) means for locally storing at least a portion of a sales information data store; and

d) means for periodically updating said locally-stored portion.

25. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data, and (2) telling the prospect about a product option correlated with the prospect's particular interest; and

c) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

26. The sales support computer of claim **25**, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

27. The sales support computer of claim **25**, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

28. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;

c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including:

(1) recording prospect data, and

(2) telling the prospect about one or more features that are correlated with the prospect's particular interest; and

d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

29. The sales support computer of claim **28**, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

30. The sales support computer of claim **28**, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

31. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;

c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data:

d) means for recording the duration of performance of respective operations in the desired sales communication process; and

e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

32. The sales support computer of claim **31**, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

33. The sales support computer of claim **31**, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

34. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;

c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about one or more product features suggested by one or more particular interests of the prospect; and

d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

35. The sales support computer of claim **34**, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

36. The sales support computer of claim **34**, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

37. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;

c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;

d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features; and

e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

38. The sales support computer of claim **37**, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

39. The sales support computer of claim **37**, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

40. The sales support computer of claim **37**, further comprising means for summoning assistance for the seller.

41. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;

c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;

d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data;

e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and

f) means for summoning assistance for the seller.

42. The sales support computer of claim **41**, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

43. The sales support computer of claim **41**, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

44. A sales support computer comprising:

a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;

b) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

c) means for querying a credit information data store to get an indication of the prospect's creditworthiness;

d) means for querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store, otherwise querying said locally-stored copy;

e) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features;

f) means for recording the duration of performance of respective operations in the desired sales communication process;

g) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and

h) means for summoning assistance for the seller.

45. A sales support computer comprising:

a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;

b) means for periodically updating said locally-stored copy;

c) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

d) means for querying a credit information data store to get an indication of the prospect's creditworthiness;

e) means for determining the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store, otherwise querying said locally-stored copy;

f) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features;

g) means for recording the duration of performance of respective operations in the desired sales communication process;

h) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and

i) means for summoning assistance for the seller.

46. A sales support computer comprising:

a) a processor;

b) a pen-based user interface;

c) a wireless communications interface;

d) a data store;

e) a program store containing programming executable by the processor for carrying out operations including:

1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;

2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;

3) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;

4) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect; and

5) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

47. A portable sales support computer comprising:

a) a processor;

b) a pen-based user interface;

c) a wireless communications interface;

d) a data store;

e) a program store containing programming executable by the processor for carrying out operations including:

1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;

2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;

3) querying a credit information data store via the wireless communications interface to get an indication of the prospect's creditworthiness;

4) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;

5) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) inputting prospect data and (2) telling the prospect about at least one of said one or more features;

6) recording the duration of performance of respective operations in the desired sales communication process;

7) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and

8) in response to a command inputted by the seller, transmitting via the wireless communications interface a signal summoning assistance for the seller.

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