



MACK LEASING SALES CERTIFICATION

SELF-STUDY GUIDE



BORN READY.

CONTENTS

- 2** INTRODUCTION
- 4** COMPLETION CHECK-OFF
- 6** MACK LEASING NEW HIRE TRAINING TIMELINE
- 8** 12-WEEK ACTION PLANNER
- 12** eLEARNING
- 24** MACK LINGO
- 30** DEALERSHIP JOB SHADOWING



INTRODUCTION

GOAL

This self-study guide (SSG) will provide foundational knowledge for the Mack Leasing Salesperson New Hire Instructor-Led Training (ILT). The SSG and the ILT will combine to provide the tools necessary to be a successful Leasing Salesperson.

WELCOME KIT

By now, you should have received your Welcome Kit and previewed the **Leasing New Hire Training Overview** video that shows how your training provides the tools to support you on the road to success. Information about the training class Facebook group is included to help you connect with other new Leasing Salespeople and your trainer. You should also have received your Trucks Dealer Portal (TDP) username and password, which you will need to complete this SSG.

If you have questions about these items, please contact your manager.

**Mack Trucks.
Born Ready.**

OVERVIEW

This training is designed to guide you to top performance in your role as a Mack Trucks Leasing Salesperson. We'll provide the tools you need to be competent and successful. When you combine your hard work with Mack Trucks' legendary reputation – you'll be at the top in no time.

The expertise you need to be a top Leasing Salesperson includes:

- Sales skills.
- Product knowledge and leasing fundamentals.
- Full customer experience understanding.
- Website, application (app), and electronic system know-how.
- Holistic dealership comprehension.

In order to gain this expertise, this SSG will guide you through the following learning tracks:

- Weekly check-ins and goal setting using a 12-Week Action Planner.
- Product knowledge, support services overview, leasing fundamentals, and sales skills training through eLearning courses in the Navigator online application, along with website and app review for better customer understanding.
- Department job shadowing for holistic dealership comprehension.
- Common acronyms and Mack Trucks language review.

This SSG is the beginning of the route to success. All activities must be completed before attending the ILT. So, let's get started.

Important Note: Your manager (or other designated manager) will need to sign off after you complete each section. You must bring this completed guide with all signatures to the final ILT portion of the program.



COMPLETION CHECK-OFF

After completion of each activity, obtain the appropriate signature. Be prepared to go over the results of the activity with your manager.

CHECK-OFF	SSG ACTIVITY	MANAGER SIGNATURE
	12-Week action plan	Date completed ___ / ___ / _____ Sales manager signature _____
	Navigator courses	Date completed ___ / ___ / _____ Sales manager signature _____
	Macktrucks.com activities	Date completed ___ / ___ / _____ Sales manager signature _____
	TDP activities	Date completed ___ / ___ / _____ Sales manager signature _____
	iPad downloads	Date completed ___ / ___ / _____ Sales manager signature _____

Important Note: You must bring this completed SSG booklet to the Mack Leasing Salesperson New Hire ILT. Remember to communicate with other new Leasing Salespersons and your trainer on the training class Facebook group in order to be fully prepared for your ILT.

CHECK-OFF	SSG ACTIVITY	MANAGER SIGNATURE
	Mack lingo definitions	Date completed ___ / ___ / _____ Sales manager signature _____
	New truck sales job shadowing	Date completed ___ / ___ / _____ Sales manager signature _____
	Finance department job shadowing and credit application	Date completed ___ / ___ / _____ Sales manager signature _____
	Parts department job shadowing	Date completed ___ / ___ / _____ Sales manager signature _____
	Service department job shadowing	Date completed ___ / ___ / _____ Sales manager signature _____

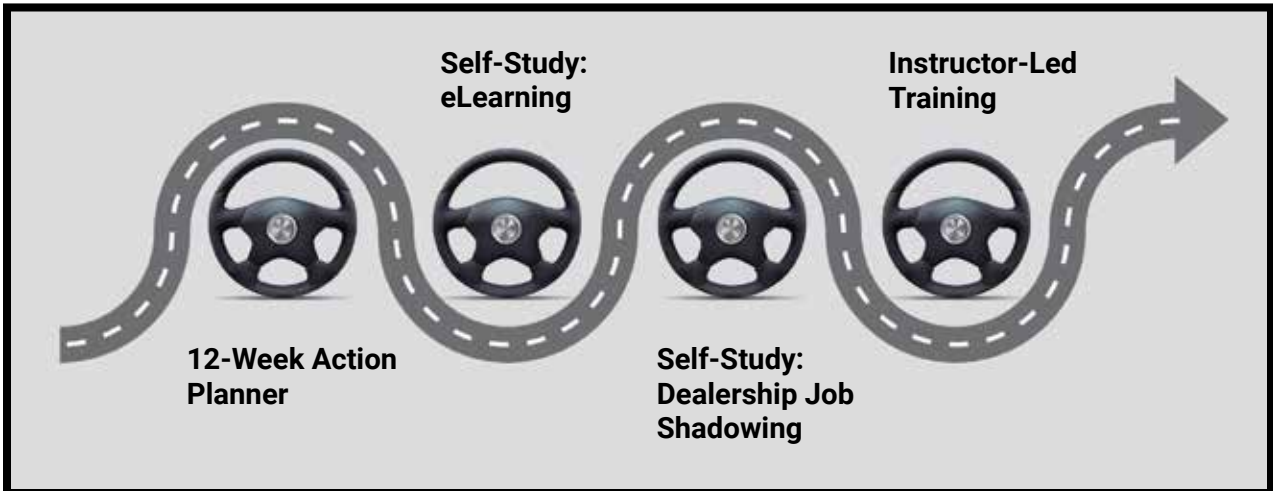


MACK LEASING NEW HIRE TRAINING TIMELINE

Use the learning map and training timeline to help you plan your progress.

LEARNING MAP

Learning begins with your weekly meetings with your manager and implementing the 12-Week Action Planner. It continues with the SSG – first with eLearning and then with dealership job shadowing. Formal learning concludes with the ILT.



TRAINING TIMELINE



Week 1–2

- Register for ILT.
- Implement 12-Week Action Plan.
- Access to the Facebook training group.
- Obtain a TDP username and password.
- Complete Leasing New Hire Training Overview video.



1–3 Months

- Complete Navigator courses.
- Complete all SSG activities and dealership job shadowing.
- Meet weekly with manager to discuss progress and goals using 12-Week Action Planner.
- Participate in Facebook training group.



3–6 Months

- Complete ILT.



12-WEEK ACTION PLANNER

SETTING & MEETING GOALS

First up in your tool kit is learning how to set and meet your goals. Each week provides a new opportunity to gain some ground and learn how to navigate rough spots, and a chance to celebrate each success.

You and your manager should use the 12-Week Action Planner during your weekly meetings. “Rough spots” should be the basis for your goals the next week.

A sample planner of the first six weeks is provided as a guide. A blank form is also provided for you and your manager to use during your first 12 weeks.



12-WEEK ACTION PLANNER – SAMPLE

MACK LEASING SALESPERSON NAME: Nick Newhire _____

WK	GOAL(S)	ACHIEVEMENTS	ROUGH SPOTS	MANAGER RECOMMENDATIONS
1	Acquire five new leasing prospects.	Identified three leasing prospects.	Not sure which customers to approach for leasing in my area of responsibility (AOR).	Research prequalifying potential customers for leasing and narrowing the list of potentials.
2	Use prequalifying techniques to narrow list of potential customers; acquire five new leasing customers.	Have a list of five prequalifying questions. Earned two new customers	Finding more customers.	Call on 10 potential customers each week
3	Call on 10 potential customers each week.	Got about seven contacts and two appointments.	Not getting past the receptionist, administrative gatekeeper, etc.	Create an elevator speech.
4	Create an elevator speech: 20- to 60-second speech about Mack Leasing, designed to hook someone into a longer conversation.	Completed eLearning courses on both product knowledge and sales skills, created elevator speech with best info and hooks	Need to practice elevator pitch and refine as new knowledge is gained	Lease 10 trucks next month, and set weekly goals.
5	Lease 10 trucks a month – four this week.	Leased three trucks this week – on track for monthly goal	Didn't understand a competitive product or one of our products	Study Mack product knowledge, and review eLearning courses.
6	Complete eLearning courses, and complete website review in SSG.	Completed half the eLearning courses on TDP, and completed website review	Need to clarify some terms referenced in eLearning courses	Complete remaining eLearning courses.

12-WEEK ACTION PLANNER

WEEKS 1 –6. Mack leasing salesperson name: _____

WK	GOAL(S)	ACHIEVEMENTS	ROUGH SPOTS	MANAGER RECOMMENDATIONS
1				
2				
3				
4				
5				
6				

12-WEEK ACTION PLANNER

WEEKS 7-12. Mack leasing salesperson name: _____

WK	GOAL(S)	ACHIEVEMENTS	ROUGH SPOTS	MANAGER RECOMMENDATIONS
7				
8				
9				
10				
11				
12				



eLEARNING

LEARNING MANAGEMENT SYSTEM COURSES

You know Mack Trucks are the most reliable trucks available. Your next training tool will provide you with the knowledge necessary to match the customer with the best Mack Truck to address each of his or her needs.

Navigator eLearning courses cover:

- Product knowledge
- Support services overview
- Leasing fundamentals
- Sales skills training

You can access Navigator from TDP at trucksdealerportal.com. Use your TDP username and password to log in. After logging in, you'll see a list of required courses that must be completed prior to attending your ILT.

Important Note: You must complete all eLearning courses and pass each course test prior to the final ILT portion of the program.

LEARNING MANAGEMENT SYSTEM HELP

If you encounter any difficulties with the Navigator, please use the following information:

- For general assistance related to the online courses, contact the Mack Trucks Academy Help Desk at academy-help@macktrucks.com.
- For operational issues with the Navigator, contact Mack Customer IT Help Desk at 1-877-978-6586, Monday through Friday, 7:00 a.m. – 8:00 p.m. Eastern Standard Time (EST), and Saturdays 8:00 a.m. – 5:00 p.m. EST.

MACKTRUCKS.COM

Macktrucks.com is a versatile learning tool you will be using on a regular basis. Leasing a Mack Truck is an important decision for your customer. Some customers may have spent hours on macktrucks.com searching for the best Mack Truck for their needs.

When they come into the leasing company, you should have complete knowledge of what's on the website, and understand it from a customer's perspective. To familiarize yourself with macktrucks.com, complete the following activities.



1

ACTIVITY ONE – MACKTRUCKS.COM

Follow these instructions, and complete the table below:

- Go to macktrucks.com.
- Review the details for all truck models.
- Identify the applications for each model.
- Identify key selling features and benefits that Mack offers for these models.
- Search for **Highway**, **Construction**, **Refuse**, and **Alternative Fuels** categories to understand search options available to the customer.
- Record the features customers might find unique: rugged, easy to maintain, light-weight, etc., for each truck.

MODEL	APPLICATIONS	KEY SELLING FEATURES AND BENEFITS
Pinnacle Series		
Granite Series		

2

ACTIVITY TWO – MACKTRUCKS.COM

Follow these instructions and complete the table below:

- Go to macktrucks.com.
- Search for **UPTIME SOLUTIONS**.
- Review the available Mack Uptime solutions.
- Click each item to reveal more information.
- Identify key selling features and benefits of the Mack Uptime solutions.
- Record the features customers might find unique: warranty packages, increased uptime, better communications, etc.

CATEGORY	KEY SELLING FEATURES AND BENEFITS
GuardDog Connect	
Mack's Uptime Center	
ASIST	
Mack Certified Uptime Centers	
Diagnostics	

3

ACTIVITY THREE – MACKTRUCKS.COM

Follow these instructions and complete the table below:

- Go to macktrucks.com.
- Search for **BUSINESS SERVICES**.
- Review the available Mack Business solutions.
- Click on each item to reveal more information.
- Identify key selling features and benefits of the Mack Business Service solutions.
- Record the features customers might find unique: maintenance programs, financing solutions, fleet performance, etc.

CATEGORY	KEY SELLING FEATURES AND BENEFITS
Customized Finance Solutions	
Mack Leasing System	
Fleet Management Services	
Mack eMedia Center	
Maintenance Intervals	

4

ACTIVITY FOUR – MACKTRUCKS.COM

Follow these instructions and complete the table below:

- Go to macktrucks.com.
- Search for **POWERTRAIN & SUSPENSIONS**.
- Review the information for each of the following, drilling down for more details:
 - Engines
 - Transmissions
 - Axles
 - Suspensions
 - Exhaust aftertreatment systems
- Identify key selling features and benefits of each category.
- Record the features that might be important to your customers.

ENGINES	KEY SELLING FEATURES AND BENEFITS
MP7	
MP8	
ISX 12 G Natural Gas	
Selective Catalytic Reduction (SCR)	

TRANSMISSIONS	KEY SELLING FEATURES AND BENEFITS
mDRIVE	
mDRIVE HD	
Maxitorque ES	

AXLES	KEY SELLING FEATURES AND BENEFITS
S38/S40 Series Axles	
C150/151 Axle Carriers	

SUSPENSIONS	KEY SELLING FEATURES AND BENEFITS
Twin Y	
mRIDE	

EXHAUST AFTERTREATMENT SYSTEMS	KEY SELLING FEATURES AND BENEFITS
ClearTech ONE	

TRUCKS DEALER PORTAL

The TDP website – trucksdealerportal.com – is an important tool for your training. It includes resources such as product and service updates that will be helpful to you as a member of the Mack Trucks leasing sales team. Knowing what is available on the site and how to find it is an important part of your training. Complete the following table using information found in the TDP. Be prepared to discuss your findings with your manager.

INSTRUCTION/QUESTION	ANSWER
Find where and how to register a truck. What questions do you have for your manager?	
What are three contracts that can be accessed through TDP?	
Provide the date and title of the most recent corporate bulletin.	
Read the latest issue of the Growler. What information was most helpful to you and why?	
Find the National Account Full Service Lease Agreement Information. Name one reason the Lessor would have the right to terminate the agreement.	
Locate the Model Year Program Update Letter. Note two points from that letter.	

INSTRUCTION/QUESTION	ANSWER
Find the Most Used Forms link. Name three forms on that link.	
Locate information about Mack Pinnacle Series. List something new you learned from this information.	
Locate information about Mack Granite Series. List something new you learned from this information.	
Locate a Schedule A. What is the purpose of this document?	
What forms and guides can you download after clicking Quote a Rental/Lease Truck ?	
Summarize the information available after clicking Sales Enablement Toolbox .	
Summarize the information available after clicking Fleet Support .	
Summarize information available about warranties.	

INSTRUCTION/QUESTION	ANSWER
Review My Membership and Other Benefits. What are some topics listed in Other Benefits?	
Find the list of National Account Managers and print for reference. Record date you print the list.	
List three of the documents found after clicking UPS Rental Program .	



iPad RESOURCES

Your electronic tools include iPad apps. The **Sales Enablement Toolbox** within TDP includes information on how to download and access the apps. These apps must be downloaded and you should become familiar with their contents prior to the ILT. Your iPads will be used during Mack Leasing Salesperson New Hire ILT.

1 DOWNLOAD MACK SALES PRO

Mack Sales Pro is a “mobile suitcase” containing sales material, digital content, corporate news, and more.

After downloading Mack Sales Pro on your iPad, complete the following:

- Note where to find a brochure on a highway product.
- Note where to find a brochure on a Mack Leasing System.

2 DOWNLOAD MACK LEASING (AKA iLEASE)

Mack Leasing (also known as iLease) is an application designed to improve different kinds of sales situations and the Full-Service Lease and Contract Maintenance quoting process.

After downloading Mack Leasing / iLease, find the User Guide.



MACK LINGO

Do you understand these industry terms? It's time to become fluent. Find the definitions for the following acronyms and terms using your electronic resources and/or during your job shadowing with dealership team members. If you're stumped for a definition, you may want to ask for help on the training class Facebook group.

ACRONYM / TERM	DEFINITION
TDP	
NTEA	
IMTA	
MATS	
GATS	
IFTA	
OEM	
Bobtail	
Reefer	
Piggy Back	
Yard Jockey	

ACRONYM / TERM	DEFINITION
Tandems	
Wiggle Wagon	
Pup	
NADA	
Tri-Axle	
Quad-Axle	
Quin	
AMT	
Elogs	
Hot shot	
GTT	
TSP	
ASIST	
SCQ	
ILT	
CAD	
BBC	
BA	
AC	

ACRONYM / TERM	DEFINITION
WB	
GVW	
GVWR	
GCW	
GCWR	
CG	
GAWR	
PSI	
HP	
LB	
KG	
KPL	
DPF	
SCR	
FFS	
BS	
OTR	
OO	
CDL	

ACRONYM / TERM	DEFINITION
PTO	
DOT	
VGT	
REPTO	
FEPTO	
OOS	
CSA	
FMCSA	
NHTSA	
EPA	
HOS	
APU	
VIN	
CNG	
LNG	
COE	
ECM	
ELD	
FAK	

ACRONYM / TERM	DEFINITION
PT	
RO	
HHG	
ICC	
MC	
IRP	
JIT	
USDOT	
LCV	
LTL	
PTI	
MVR	
NTSP	
OODA	
PO	
DVIR	
POE	
PR	
TEU	

ACRONYM / TERM	DEFINITION
TL	
GDC	
MCC	
LVO	
RSA	
MFS	





DEALERSHIP JOB SHADOWING

Your sales depend on your entire Mack Trucks team. Your next training tool, job shadowing, is all about how your Mack Trucks team ensures the customer's peace of mind. Make time to job shadow team members in the following dealership departments: New Truck Sales, Finance, Parts, and Service.



**When your trucks
stand still,
you're losing money.**

Mack Trucks customer

NEW TRUCK SALES

Schedule time with a mentor from New Truck Sales; this should be an experienced salesperson. Job shadow the mentor, observing interactions with customers and asking questions. Ensure you can answer the following questions at the end of your job-shadowing period. Write down notes from your observations and conversations in the space provided.

1

Does your dealership use Application Recommendations for regional haul, long haul, and/or dump trucks? If not, why not and what do you use?

2

Are leads passed back and forth between a Retail Salesperson and a Lease Salesperson? What is the partner relationship with the Retail Sales department?

3

Ask your mentor about a time when he or she took a telephone call or a walk-in, etc., that really stood out. Why did it stand out? What can you learn from that?

4

What types of questions should you be asking to determine the needs of your customers?

5

How do you know if the trucks on the lot will fit the customer's needs?

6

How are trades handled at your location? When a customer comes in with a trade, how does your location market the truck at the end of the lease?

7

How does your mentor price a deal? What kind of gross profit is put into the deal?

8

What makes the person you are shadowing successful in sales?

9

Is there anything specific that your location uses for presentations? For example, are there specific points of conversation or PowerPoint® (PPT) presentations?

10

Has the person you are job shadowing overcome a price objection? What's the biggest objection he or she has heard when it comes to selling or leasing a Mack Truck? Which price objections are indicators that leasing may be a better option for the customer?

11

What forms are included in the standard closing package for your dealership?

12

What is done for delivery? Does your mentor set up Bluetooth, do a walk-around, etc.? Does the type of lease determine the type of delivery service?

13

Is there anything our customers are used to getting after the sale? Is there specific follow-up at three months or six months, etc.? How does your mentor handle follow-ups?

14

What are three main lessons you learned from this mentor session that will support your leasing efforts?

15

Create an additional question for the Sales Manager.

Your question:

Answer:



FINANCE DEPARTMENT

Schedule time to shadow your dealership's Finance and Insurance Manager or your Mack Financial Services District Finance Manager. Learn how the finance professionals accomplish the tasks below and how you can support the process. Consider how this knowledge will help you better understand your customer. Ensure you can answer the following questions at the end of your job-shadowing period. Write down notes from your observations and conversations in the space provided.

1

What is involved in pre-qualifying a customer?

2

What do lenders need from your customers? What are three things every lender asks for?

3

What are lenders' typical underwriting requirements?

4

What are the documents customers will need to bring with them to lease a Mack Truck? What are some of the addendums that may be requested in addition to standard documents?

5

What finance transaction system does your dealership use? What is important for you to know about that system?

6

What is a Guaranteed Auto Protection (GAP) waiver?

7

What do these terms mean and how do they apply to a lease?

- Physical damage insurance
- Liability insurance
- Non-trucking liability insurance

8

Which financing requirements can vary by lender?

9

What is a captive finance company? How is it valuable to our members?

10

Activity: Complete a credit application.
Bring a copy of the completed application to the final ILT.

11

What are three main lessons you learned from this job-shadow session that will support your leasing efforts?

12

Create an additional question for the Finance department.
Your question:

Answer:

PARTS DEPARTMENT

Mack Trucks are born ready; when maintenance is needed, our Parts department is on the job, ensuring that your customers can get back to theirs.

Spend time shadowing an experienced employee in the Parts department so you can have a better understanding of the processes and systems used to make sure Mack parts are available when our customers and lease members need them.

Observe and ask questions. Ensure you can answer the following questions at the end of your job-shadowing period. Write down notes from your observations and conversations in the space provided.

1

What are some components your dealership doesn't carry in stock?
Walk through the process of how a customer orders parts online.

2

Does your dealership have an Outside Parts Salesperson?
What is your role as a Lease Salesperson in respect to parts?

3

How does SELECT™ Parts Store work? Ask for a demonstration on how it works with the IMPACT™ Parts Catalog. How do these help the customer?

4

How do you know you're getting the right part for the right truck?
How quickly do the parts typically arrive?

5

How many customers are using Mack FleetPREFERRED™?
What kind of problems has your mentor had with the FleetPREFERRED process?

6

Where is your dealership's distribution center?
How often does your dealership call other stores for parts?

7

What is your dealership's internal process to call the Parts Service department?
Are all your customers set up with SELECT Part Store?

8

What are three main lessons you learned from this job-shadow session that will support your leasing efforts?

9

Create an additional question for the Parts department.

Your question:

Answer:



SERVICE DEPARTMENT

When you rely on your truck to do your job, a service plan can go a long way toward peace of mind. To better understand the customer service experience, spend time job shadowing in the Service department. Observe and ask questions. Ensure you can answer the following questions at the end of your job-shadowing period. Write down notes from your observations and conversations in the space provided.

1

How does a leasing company file a warranty claim? What information do they need to bring? Can leasing companies do their own warranty work? What is your role in the warranty claim process?

2

What is the standard warranty coverage? What Protection Plans are leasing companies buying and which ones does your leasing company normally buy? What plans should you be buying at your leasing company?

3

What is needed in order to register a truck for a warranty? How do you register your leasing company for GuardDog Connect? Does your mentor set up the profile in Mack ASIST?

4

What are some of the biggest issues your mentor has when dealing with customers? What are some common repairs he or she has seen? What are the common repairs for trucks at different ages and mileages?

5

Will you, as a lease member, utilize ASIST? What are the pros and cons of using ASIST? What has been the customer reaction to ASIST?

6

Does your dealership have specific guidelines for what to do if there's an incident in the shop? What does everyone in the building need to do? What are your practices in regards to natural gas? Are customers allowed to be in the shop area at any time?

7

What are the preventative maintenance schedules? When do customers need to bring their lease trucks in for service?

8

How does your mentor receive service bulletins? Are you allowed to pass on service bulletins to the customer? What is the customer-contact process when a service bulletin is issued?

9

When your mentor has completed service on a vehicle, does he or she take it for a road test? If so, how far? How often after the road tests are additional repairs needed?

10

What's your role in the Pre-Deliver Inspection (PDI) process? What do you need to do? Does your mentor verify the engine parameters, or do you need to do that? Is there a charge to the Sales department? What is the overall PDI process at your dealership?

11

If a truck is used, does your mentor do a regeneration of the truck before it goes out?

12

Is the diesel exhaust fluid (DEF) tank topped off for the customer? What kind of problems are drivers having with the exhaust aftertreatment system (EATS)?

13

What are three main lessons you learned from this job-shadow session that will support your leasing efforts?

14

Create an additional question for the Service department.

Your question:

Answer:

