



LEFT: Winnebago's Itasca division scored highly in the survey, finishing eight points ahead of industry average. Itasca sales personnel also were most likely to help buyers explore financing options.

BELOW: Monaco topped the charts, pegging the Pied Piper Prospect Satisfaction Index at 111.

New Service Keys on Consumer Class A Shopping Experience

Pied Piper's 'Prospect Satisfaction Index' Rates RV Dealerships' Performance During Sales Process

Pied Piper Management Company LLC of Pacific Grove, Calif., released the results of its first RV industry prospect satisfaction study in June, showing how RV shoppers are treated at dealerships which sell Class A motorhomes.

The top five ranked Class A brands in the initial survey were Monaco, Damon, Itasca, Sportscoach and Holiday Rambler.

The Pied Piper Prospect Satisfaction Index allows RV manufacturers and RV dealers to order evaluations of dealerships to see how the performance of their salespeople compares to the RV industry national average, and to the national average of other same brand dealerships. The service measures how a dealership handles more than 50 different aspects of the RV sales process, then highlights aspects of the process where the dealership performs well, as well as areas which lag behind industry benchmarks.

Although Pied Piper has a long background in the auto and motorcycle industries, its experience in the RV industry began more recently. "Our introduction to the RV business began three years ago helping Monaco Coach Corp. develop its



Franchise for the Future program," said Fran O'Hagan, who developed the index and is president of Pied Piper. O'Hagan also said that Pied Piper's relationship with Monaco Coach was completely separate from the survey, which Pied Piper carried out independently. "The first time the Monaco Coach folks found out about the study was when I e-mailed the

rankings to Kay Toolson, Monaco's chairman and CEO, the evening before we released the results," said O'Hagan.

Although the Monaco brand finished first overall, other brands dominated the industry for certain aspects of the sales process. According to survey results, shoppers for Itasca were most likely to find salespeople who mentioned different financing options or who mentioned the availability of extended warranties. Mandalay dealers ranked first for providing reasons to buy from their specific dealership. Sportscoach dealers were tops for addressing features and benefits applicable to the shopper and American Coach dealers ranked first for attempting to forward the sale and for gathering contact information.

O'Hagan noted that evaluating the experience of RV shoppers is important because 75% to 90% of RV shoppers don't buy the same day they visit a dealership.

"We asked ourselves what makes some of these prospects return to buy, while others do not return, and some even bad-mouth the dealership to their friends," said O'Hagan. "Sometimes dealerships and salespeople are so focused on customers who buy that they neglect the prospects — the customers who have not yet bought."

O'Hagan calls it a problem of alignment, or more accurately, misalignment. "Give a dealership owner a chance to interact with a prospect, and the owner's goal is for the prospect to buy," he said. "But if they aren't going to buy today, most owners want prospects to leave as a fan of the store, understanding that they will be back, and that they will tell their friends about the store, too."

O'Hagan contrasts that attitude with a salesperson's attitude toward someone who is "just looking around," adding that many times the salesperson sizes up the prospect to determine whether they will generate a commission. If not, some salespeople begin looking for another prospect that will. This is O'Hagan's "misalignment" — the difference between the long-term goals and attitudes of many owners and the short-term goals and attitudes of many salespeople.

To measure prospect satisfaction, Pied Piper developed a process which divides the typical industry sales process into hundreds of different factors, then researches the importance of each with real shoppers at dealerships throughout the country.



The company sends anonymous shoppers to the same locations, to compare their responses to the responses from the real shoppers, and used the findings to reduce the sales process factors into an approximately 50-question survey. Ultimately, for the RV study, shoppers visited

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ABOVE: Damon placed second overall in the study, which monitors customer satisfaction during the various stages of the sales process. The index was created by Fran O'Hagan (left), who also is president of Pied Piper. According to O'Hagan, the study helps manufacturers and dealers fine-tune the actions of their sales forces — vital, because more than 75% of shoppers don't buy the same day, but do retain an image, positive or negative, of the salesperson they dealt with.

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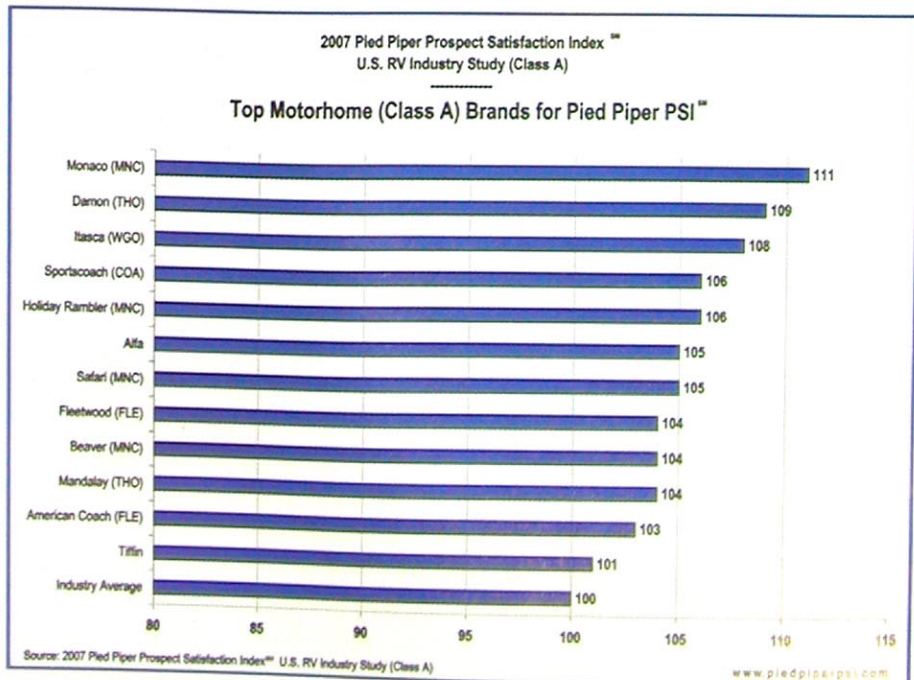
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Although the RV industry lacks industrywide data on customer satisfaction by brand, other motor-vehicle industries have plenty of it — and Pied Piper discovered that *shopper* satisfaction results don't necessarily match up with *customer* satisfaction results.

"We found that feedback about the sales process from customers who have purchased is influenced substantially by the ownership experience — especially when customers are questioned days if not weeks or months after the purchase," said O'Hagan. "In contrast, our shoppers report back what happened to them within hours."

Pied Piper also found that the variation in response is much larger when shoppers are asked about the sales experience, compared to the same question posed to buyers. O'Hagan mentioned an auto industry example showing that the typical sales-satisfaction rate for buyers is 90% to 95%, compared to 50% to 70% for shoppers.

The company also offered some other comparisons to the auto and motorcycle industries. "In general, RV industry salespeople perform quite well compared to salespeople in the auto or motorcycle industries," said O'Hagan, "However, there are sales process aspects where the RV industry has room for improvement — and there is also quite a lot of variability from brand to brand and from dealership to dealership."

According to the survey results:

■ A positive initial first impression was reported by 78% of RV shoppers, compared to 91% of auto shoppers and 90% of motorcycle shoppers.

■ RV shoppers are the most likely to be greeted promptly (89% of the time), compared to 85% of the time for auto shoppers, and 74% for motorcycle shoppers.

■ RV salespeople introduce themselves 85% of the time, compared to 91% for auto and 68% for motorcycle.

■ RV salespeople are more likely to determine the shopper's price range (74% of the time vs. 64% for auto and 47% for motorcycle), and are more likely to discuss features of a brand and model which are unique from the competition (75% of the time vs. 58% for auto and 46% for motorcycle).

■ RV test drives are offered to RV shoppers 38% of the time, compared to 89% of the time for auto shoppers, and 18% of the time for motorcycle shoppers.

To compensate somewhat for a lack of test drives, RV salespeople are much more likely to offer a brochure (85% of the time, compared to 66% auto and 63% motorcycle.)

■ RV salespeople attempt to forward or close the sale 66% of the time, compared to 76% for auto and 35% for motorcycle.

■ RV salespeople are less likely to encourage the shopper to return to the dealership (62% of the time vs. 76% for auto and 35% for motorcycle), or to ask the shopper for contact information (68% of the time vs. 83% for auto and 45% for motorcycle.)

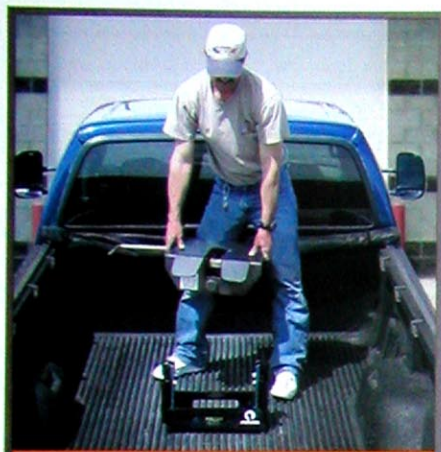
■ From a manufacturer's perspective, the study revealed that RV dealerships push a brand other than the brand requested by the shopper 17% of the time vs. only 6% of the time for auto shoppers and 19% for motorcycle.

Perhaps most importantly, O'Hagan found that compared to auto shoppers, RV shoppers are more likely to walk out of the dealership with no effort whatsoever by the sales staff to sell anything to the shopper, or even to ensure that the shopper returns to the dealership.

According to Pied Piper, the most important "tool" for turning a prospect into a customer is positively modifying the behavior of the salespeople.

"Do your salespeople automatically gather contact information and then follow up after a prospect visits?" O'Hagan asked rhetorically. "Do they remember to give prospects reasons to buy from this dealership rather than another one? Do they always remember to mention product features unique from the competition, or special financing and leasing? Do they always ask for the sale?"

According to O'Hagan, who licenses the results of the survey, even brands which perform better than the industry average have dealerships which lag behind, noting how one manufacturer client found that salespeople from its most successful dealerships were 25% to 60% more likely than salespeople from less successful dealerships to give compelling reasons to buy now, to uncover factors preventing the purchase or to ask the prospects follow-up questions. A



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