



PHONE FOUNDATIONS

BIG O PHONE ACADEMY

Complete Associate Workbook • Episodes 1–5 • Version 2.0



Answer Every Call. Build Every Relationship. Earn Every Appointment.

WORKBOOK PURPOSE Use this companion while completing the online academy. Complete each pause activity, practice aloud, finish the knowledge checks, and review every mission with your manager.

How to Use This Workbook

Associate _____

Store _____

Manager /
Coach _____

Start date _____

Target
completion _____

The Learning Rhythm

1 WATCH Follow the video and write down the key ideas.

2 PAUSE Stop when prompted and complete the activity.

3 PRACTICE Say the language aloud until it sounds natural.

4 APPLY Use the skill on real calls with coaching.

5 SIGN OFF Review your practice with a manager or coach.

This workbook is a practice tool—not a script to read during customer calls.

ONLINE RECORD Enter responses and knowledge-check answers in the online academy when possible. This printed workbook may be used for notes and practice; submitted certification results are stored online.

EPISODE 1

Every Ring Is an Opportunity



MISSION 1 Own the Call

Before You Watch

What do you believe a customer expects when someone answers the phone?

Episode Objective

- ☐ Explain why every phone call matters.
- ☐ Recognize the person and concern behind each ring.
- ☐ Describe Rings to Swings.
- ☐ Reset your attitude before answering.

Episode 1 Guided Notes

Complete the Key Phrases

WRITE IT People call because they need _____.

WRITE IT Your job is to make them feel they called the _____.

WRITE IT Customers do not expect perfection. They expect _____,
_____, and _____.

WRITE IT The first need is _____.

WRITE IT Rings to Swings means turning a phone call into a
_____.

The Nine-Step Roadmap

1. Great first impression	2. Positive responses	3. Build relationships
4. Purposeful questions	5. Lowest qualified price	6. Sell value
7. Buying signals	8. Overcome objections	9. Get the commitment

Episode 1 Pause Activity: Sarah's Call

The video asks: What is Sarah hoping happens next? Write three expectations before continuing.

#	Sarah hopes...
1	
2	
3	

Hear the Difference

Opening	What the customer hears	Likely result
"Big O."	_____	_____
Official greeting	_____	_____
My takeaway	_____	_____

Reflection

If I were the customer, would I want to keep talking to me? Why or why not?

Mission 1 Practice and Check

The Reset Routine

- ☐ Pause.
- ☐ Take one breath.
- ☐ Smile.
- ☐ Answer clearly.

Three-Call Practice Log

Call	Paused	Smiled	Clear greeting	What I learned
1	☐	☐	☐	
2	☐	☐	☐	
3	☐	☐	☐	

Quick Knowledge Check

1. What is the first need on Sarah's call?

2. What does Rings to Swings mean?

3. What should you do immediately before answering?

Associate
initials

Manager
initials

Date
completed

EPISODE 2

The First Ten Seconds



MISSION 2 Become a First Impression Pro

Episode Objective

- ☐ Deliver the official Big O greeting confidently.
- ☐ Use pace, energy, clarity, and warmth.
- ☐ Replace flat language with positive responses.
- ☐ Handle hold requests professionally.

The Big Idea

In the opening seconds, the customer decides whether to continue the conversation or call somewhere else. What should your voice communicate?

Episode 2 Guided Notes

The Official Greeting

SAY IT ALOUD Thank you for choosing Big O Tires and Service, this is _____.

Why Each Part Matters

Greeting element	Purpose
Thank the customer	_____
Identify Big O	_____
Give your name	_____

My Natural Delivery

Mark the words you want to emphasize, then rewrite the greeting in the rhythm that sounds most natural to you—without changing the required wording.

Your Voice Toolbox

Skill	What it sounds like	My coaching note
PACE	Easy to understand; never rushed	
ENERGY	Ready and willing to help	
CLARITY	Complete store name and your name	
WARMTH	A smile the customer can hear	

Positive-Language Makeover

Instead of...	Try...
Okay.	_____
I don't know.	_____
We can't do that today.	_____
You'll have to call back.	_____

REMEMBER Positive language remains honest. It focuses the customer on the next helpful step.

The Hold Experience



FOUR STEPS ASK • EXPLAIN • THANK • RETURN

Practice the Hold Request

Write the exact words you will use to ask permission and explain why you need a brief hold.

If the Wait Will Be Longer

- ☐ Return to the caller promptly.
- ☐ Offer to call the customer back.
- ☐ Confirm the best callback number.
- ☐ Thank the customer for their patience.

Greeting Practice Lab

Practice the full greeting three times. Ask a partner or manager to score each attempt from 1–5.

Skill	Attempt 1	Attempt 2	Attempt 3	Goal
Pace	___/5	___/5	___/5	4+/5
Energy	___/5	___/5	___/5	4+/5
Clarity	___/5	___/5	___/5	4+/5
Warmth	___/5	___/5	___/5	4+/5

Five-Call Mission Log

Call	Full greeting	Said name clearly	Positive response	Coaching note
1	☐	☐	☐	
2	☐	☐	☐	
3	☐	☐	☐	
4	☐	☐	☐	
5	☐	☐	☐	

Episode 2 Knowledge Check and Sign-Off

1. What are the three required parts of the official greeting?

2. Name the four skills in the Voice Toolbox.

3. Rewrite “I don’t know” using positive language.

4. What must you do before placing a customer on hold?

5. What should you offer if the hold will take longer?

Manager Observation

- ☐ Uses the complete greeting consistently.
- ☐ Sounds friendly, clear, and confident.
- ☐ Uses positive language.
- ☐ Asks permission before placing callers on hold.
- ☐ Is ready to progress to Episode 3.

Associate
signature

Manager
signature

Completion
date

Result

☐ Complete ☐ More practice needed

PROGRESS Missions 1 and 2 complete. Next: Episode 3 — Ask Before You Answer.

EPISODE 3

Ask Before You Answer



MISSION 3 Become a Customer Detective

Episode Objective

- ☐ Build a relationship before discussing products or price.
- ☐ Use a question funnel to uncover the customer's real need.
- ☐ Listen for facts, feelings, and priorities.
- ☐ Confirm what you heard before recommending the next step.

Before You Watch

A customer says, "I need tires." What would you ask before discussing tire options?

Start with the Relationship

CONVERSATION OPENER I'd be happy to help. May I ask your name?

The First Three Connections

Connection	My words	Why it matters
Customer name	_____	Makes the call personal
Callback number	_____	Protects the connection
Permission to ask	_____	Makes questions feel helpful

Practice It Aloud

Write and practice a natural transition into discovery questions.

REMEMBER The product is not the whole story. The customer is.

The Question Funnel



Stage	Purpose	Example question
OPEN WIDE	Hear the situation	Tell me what is going on.
GET SPECIFIC	Clarify symptoms	When did you first notice it?
VEHICLE	Identify the vehicle	What is the year, make, and model?
PRIORITY	Learn what matters	What is most important to you?
NEXT STEP	Guide the customer	Would today or tomorrow work better?

My Best Follow-Up Question

COACH'S NOTE Ask one question at a time. Questions should feel like help—not an interrogation.

Pause Activity: Write Five Questions

Sarah says: "My brakes are making a strange noise, and I have a family trip tomorrow." Write one purposeful question in each category before continuing the video.

Question type	My question	What it uncovers
Open question		
Vehicle question		
Timing question		
Priority question		
Confirmation question		

Question Quality Check

- ☐ My questions are easy to understand.
- ☐ I asked only one question at a time.
- ☐ I did not diagnose the vehicle over the phone.
- ☐ My questions lead toward a safe, useful next step.

Listen and Confirm



Listen for Three Layers

Layer	What Sarah said	What it tells us
FACTS	Grinding noise	_____
FEELINGS	Worried about the vehicle	_____
PRIORITIES	Family trip tomorrow	_____

Confirm Before You Recommend

MODEL Sarah, let me make sure I have this right... Is that correct?

Write a confirmation statement for a customer who reports a tire losing air before leaving for work tomorrow.

Mission 3 Practice, Knowledge Check, and Sign-Off

Two Discovery Conversations

Call	Name	Callback	3+ questions	Confirmed	Coach's note
1	☐	☐	☐	☐	
2	☐	☐	☐	☐	

Quick Knowledge Check

1. Why should an advisor ask questions before recommending a solution?

2. Name the five stages of the question funnel.

3. What three layers should you listen for?

4. Why should you confirm what you heard?

Manager Observation

- ☐ Builds rapport before discussing price.
- ☐ Asks purposeful questions naturally.
- ☐ Listens without interrupting.
- ☐ Confirms the customer's concern accurately.
- ☐ Is ready to progress to Episode 4.

**Associate
signature**

**Manager
signature**

**Completion
date**

Result

☐ Complete ☐ More practice needed

PROGRESS Missions 1–3 complete. Next: Episode 4 — Build Value.

EPISODE 4

Build Value



MISSION 4 Become a Value Builder

Episode Objective

- ☐ Explain the difference between price and value.
- ☐ Present the requested option and a lowest qualified option when appropriate.
- ☐ Connect features to benefits that matter to the customer.
- ☐ Respond to price concerns with empathy and clarity.

BIG IDEA Price starts the conversation. Value earns the appointment.

Quote Correctly

Two Qualified Options

Option	What I should explain	Customer benefit
Requested option		
Lowest qualified option		

SAFETY STANDARD Never recommend a product that is not appropriate for the vehicle. Avoid overwhelming the customer with a long list.

Feature-to-Benefit Practice

Feature	Benefit	Connect it to...
Mileage warranty		
Wet-weather traction		
Alignment check		
Appointment scheduling		

The Value Bridge



1 ACKNOWLEDGE Recognize the customer's question or concern.

2 EXPLAIN Describe the qualified option clearly.

3 RELATE Connect the benefit to the customer's priority.

4 INVITE Guide the customer toward a useful next step.

Write a Value Statement

Customer priority: dependable wet-weather travel for the family.

Pause Activity: Price Concern

CUSTOMER SAYS Another shop quoted me less.

Write a response using all four parts below before continuing the video.

Part	My response
Acknowledge	
Clarifying question	
Relevant benefit	
Invite next step	

Value Accuracy Check

- ☐ I did not criticize the competitor.
- ☐ I clarified what the other quote includes.
- ☐ I mentioned only benefits that actually apply.
- ☐ I avoided discounting before understanding the concern.

Mission 4 Practice and Sign-Off

Three Value Conversations

#	Call type	Feature	Benefit	Signal check	Coach's note
1	Tire			☐	
2	Oil service			☐	
3	Brake service			☐	

Quick Knowledge Check

1. What is the difference between a feature and a benefit?

2. When should you present a lowest qualified option?

3. What are the four parts of the Value Bridge?

4. What should you do before responding to a competitor's lower quote?

Associate
signature

Manager
signature

Completion
date

Result

☐ Complete ☐ More practice needed

EPISODE 5

Earn the Appointment



MISSION 5 Become an Appointment Champion

Episode Objective

- ☐ Recognize common buying signals.
- ☐ Ask confidently for the appointment.
- ☐ Offer two real, convenient choices.
- ☐ Confirm every appointment detail.
- ☐ Close professionally without pressure.

BIG IDEA Every great call ends with a clear next step.

Recognize the Buying Signal

Write what each statement tells you and the next question you would ask.

Customer says...	What it signals	My next question
That sounds like a good fit.		
How long would it take?		
When can you get me in?		
Do you have it in stock?		
Can I wait for it?		

Stop Explaining

COACH'S NOTE When the customer signals readiness, listen and ask for the appointment. More information can create new uncertainty.

The Appointment Close

TWO-CHOICE CLOSE We have an opening today at 2:30 or tomorrow morning at 9:00. Which works better for you?

Write Two Real Choices

Option 1	_____
Option 2	_____
My complete close	_____

Weak Close vs. Strong Close

Close	What it sounds like	Likely result
Weak	Call us if you decide.	_____
Strong	Let's reserve a time...	_____

Pause Activity

Practice your appointment close aloud three times. Offer two real choices, then stop talking.

Attempt	What improved	Coach initials
1		
2		
3		

Confirm Every Detail



Appointment Confirmation Checklist

- ☐ Customer's name
- ☐ Date
- ☐ Time
- ☐ Correct store location
- ☐ Helpful landmark or directions
- ☐ What happens upon arrival
- ☐ Best callback number
- ☐ Advisor's name
- ☐ Professional thank-you

My Confirmation Language

Simple Objection Practice

Use: Acknowledge • Clarify • Respond • Ask

Customer says...	My response	Did I ask again?
I need to think about it.		☐
I need to ask my spouse.		☐
I may call back later.		☐
REMEMBER Guide the customer without pressure. If they are not ready, remain helpful and professional.		

Episode 5 Knowledge Check

1. Name two buying signals.

2. Why are two appointment choices effective?

3. What details must be confirmed after the customer agrees?

4. What is the difference between confidence and pressure?

Final Certification: Three Complete Calls

Complete one scenario in each category. Your manager rates each of the eight behaviors from 0 to 5 in the online academy.

#	Scenario	Customer situation	Objection or signal
1	Tire inquiry		
2	Oil-service request		
3	Brake or service concern		

Eight Behaviors Your Manager Scores

Behavior	0–5	What strong performance looks like
Greeting	___/5	Complete approved greeting and clear introduction.
Tone & professionalism	___/5	Confident pace, energy, clarity, warmth, and ownership.
Relationship building	___/5	Uses the customer's name and establishes trust.
Purposeful questions	___/5	Discovers facts, feelings, priorities, vehicle, and timing.
Value presentation	___/5	Connects an accurate benefit to the customer's need.
Objection handling	___/5	Acknowledges, clarifies, and responds without pressure.
Appointment request	___/5	Directly asks for the visit and offers useful choices.
Professional close	___/5	Confirms details, next step, callback, and thanks.

CRITICAL SKILL Appointment request must be rated 4 or 5 on all three calls. The academy calculates each call percentage and the final average automatically.

Big O Phone Foundations Completion



PHONE FOUNDATIONS

Big O Phone Certified

FIVE MISSIONS COMPLETED Own the Call • First Impression Pro • Customer Detective • Value Builder • Appointment Champion

Every Requirement Must Be Met

- ☐ Completed all five video episodes.
- ☐ Received manager sign-off for all five missions.
- ☐ Earned a knowledge-check score of 90% or higher.
- ☐ Earned an average call score of 90% or higher.
- ☐ Received an appointment-request rating of 4 or 5 on every certification call.

What Happens Next

- ☐ The signed-in manager completes the online rubric.
- ☐ The academy calculates the call scores and certification status.
- ☐ The manager submits the certification attempt.
- ☐ If Certified, the manager downloads the employee certificate.
- ☐ If More coaching needed, complete targeted practice and retest with a new scenario.

Associate
name

Store

Final call score _____ / 100

Knowledge
score

_____ / 100

Certification ID

Certification
date

Answer Every Call. Build Every Relationship. Earn Every Appointment.