

Closing Checklist

Closing a sale starts early by introducing special financing options in your first conversation with consumers. Mentioning special financing options puts the consumers at ease because you've opened up possibilities and focused on managing the purchase — which helps them get what they need and want.

Throughout your presentation, it's also important to build rapport and create trust by demonstrating confidence and knowledge.

And finally, be sure to use a closing system that includes special financing options. Use this checklist to guide you through the steps needed to close.



CHECKLIST

- Build rapport and create trust by demonstrating confidence and knowledge.**
 Notes: _____
- Do a needs assessment using the [Needs Assessment Tool](#).**
 Notes: _____
- Mention financing at the beginning of the sales process and at points throughout.**
 Notes: _____
- Give consumers choices — let them choose the promotion that works for them.**
 Notes: _____
- Listen and understand financing hesitations.**
 Notes: _____
- Be clear and transparent — properly deal with any hesitations.**
 Remember, hesitations are a natural part of the process.
 Notes: _____
- Use Synchrony's approved in-home selling tools such as our [Synchrony Transact Payment Estimator](#) and Promotional Option materials.**
 Notes: _____
- Help consumers by walking through the steps to apply** — including having them look over the Terms and Conditions and reviewing the completed application form for accuracy.
 Notes: _____