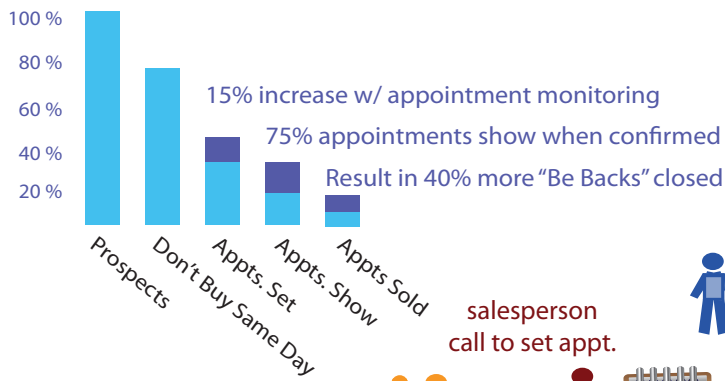
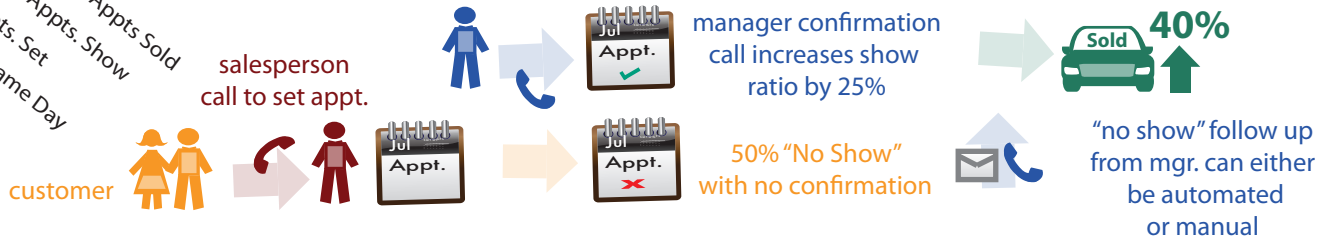


# DealerSocket Sales Appointment Management - Best Practices

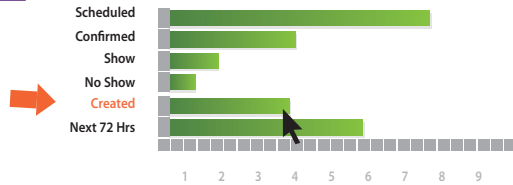


**"He who fails to plan is planning to fail."**  
- Winston Churchill

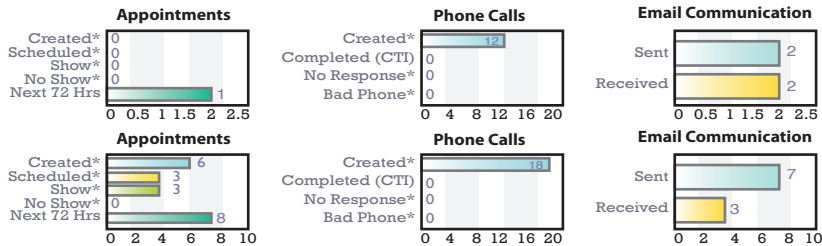


## Appointment Setting Process

**1** Throughout Shift: Monitor how many appointments have created today



**2** End of Shift: Check in Sales Checkout - with the phone calls made, did the salesperson schedule appts?



**3** Daily/Weekly: Use numbers on Sales Checkout Report to see if salespeople are on track to meet monthly goals

MONTHLY TOTALS OF KEY SALES METRICS

NEW PROSPECTS	VISITS	APPTS	SOLDS	FRONT GROSS	BACK GROSS	TOTAL GROSS
32	41	13	5.5	\$22,159	\$5,448	\$29,448
53	68	20	9	\$48,159	\$9,142	\$57,301
24	30	8	4	\$17,177	\$3,561	\$20,728
37	48	16	8	\$43,459	\$8,678	\$52,137

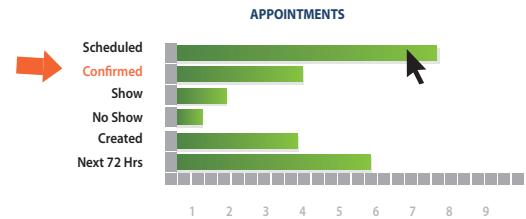
**4** Daily: Appointment Display Report - Helps customer feel important/special when shown. Makes sales team want to be on the display (Don't want to be the only one not on)

Nissan Demo

Customer Name	Appointment Time	Appointment With
Loretta Nieto	4/5/2014 11:30 AM	Andrew Jackson
Nancy Arriaga	4/5/2014 1:00 PM	George Washington
Gloria Futral	4/5/2014 1:15 PM	Abraham Lincoln
Nelson Santan	4/5/2014 2:30 PM	Michael Jordan
Victor Hughes	4/6/2014 9:00 AM	John Doe

## Appt Confirmation Process

**1** Beginning of Shift: Click Bar of Scheduled Appts. in the Sales Console of Mgr. Dashboard



**2** Click on Names of Customers to Update the Status of Upcoming or Past Appointments

Nick Rimando	CONF SHOW SOLD Camille Williams H (810) 468 - 4563 M (810) 468 - 4563 Time: 11:00 AM (N) 2008 Toyota Camry	
Kyle Beckerman	CONF SHOW SOLD William Hansen H (810) 798 - 4563 M (810) 468 - 4563 Time: 11:00 AM (U) 2005 Nissan Altima	CONF SHOW SOLD Brandon Mos H (810) 468 - 7891 W (810) 448 - 4321 Time: 11:00 AM (N) 2011 Nissan Armada

**3** On the Right Side of Screen - Click the Status of Appointment and Change to Current Status

To Do Type: Appointment  
Status: Open  
Assigned To: Kyle Beckerman  
Due Date: 12/08/11 5:30 PM  
Comment: Need to get Black Armada ready

**4** End of Shift: Make Sure that "No Show" and "Show" Bars = Scheduled; Follow up on "No Show" Appts

