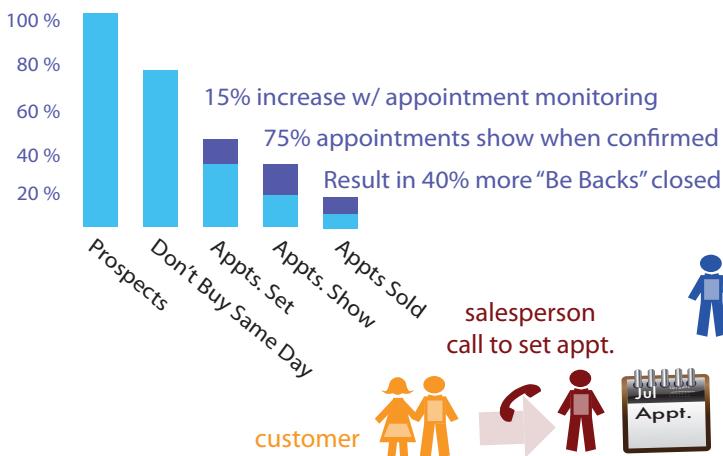


# DealerSocket

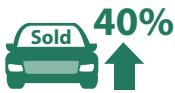
## Sales Appointment Management - Best Practices



"He who fails to plan is planning to fail."

- Winston Churchill

manager confirmation call increases show ratio by 25%



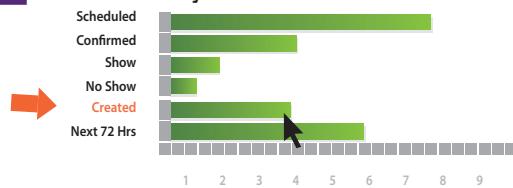
50% "No Show" with no confirmation



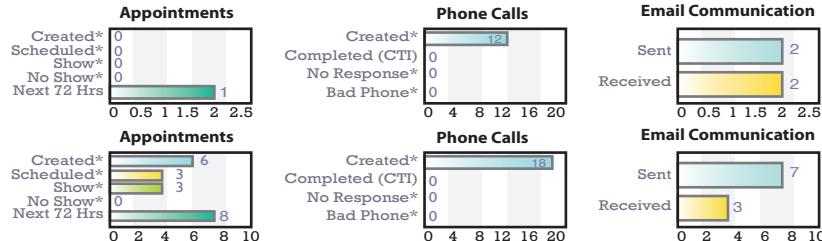
"no show" follow up from mgr. can either be automated or manual

### 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

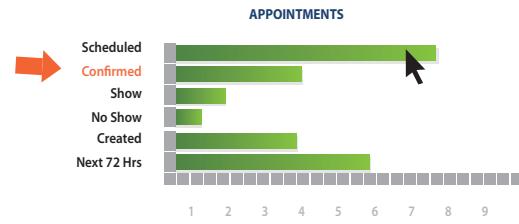
| MONTHLY TOTALS OF KEY SALES METRICS |        |       |       |             |            |             |
|-------------------------------------|--------|-------|-------|-------------|------------|-------------|
| NEW PROSPECTS                       | VISITS | APPTS | SOLDS | FRONT GROSS | BACK GROSS | 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   |  | Welcome   |
|---|--|---|
| Customer Name   | Appointment Time   | Appointment With  |
| Loretta Nitro<br>Nancy Biggs<br>Gloria Futrell<br>Nelson Santan<br>Victor Huges | 4/5/2014 11:30 AM<br>4/5/2014 12:00 PM<br>4/5/2014 1:15 PM<br>4/5/2014 2:30 PM<br>4/6/2014 9:00 AM | Anthony Smith<br>George Washington<br>Abraham Lincoln<br>Michael Jordan<br>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 |  |
|------------------|-----------------|-----------------|------|------|------|--|
|                  |                 |                 | CONF | SHOW | SOLD |  |
| Camille Williams |                 |                 |      |      |      |  |
|                  | H(810) 468-4563 | M(810) 468-4563 |      |      |      |  |
| William Hansen   |                 |                 |      |      |      |  |
|                  | H(810) 468-4563 | M(810) 468-4563 |      |      |      |  |
| Brandon Mos      |                 |                 |      |      |      |  |
|                  | W(810) 444-4321 | M(810) 444-4321 |      |      |      |  |

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

|             |                                     |
|-------------|-------------------------------------|
| To Do       | <input checked="" type="checkbox"/> |
| To Do Type  | Appointment                         |
| Status      | Open                                |
| Assigned To | Kyle Beckerman                      |
| Due Date    | 12/08/11                            |
| 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

