Beginning of Shift

20-30 Mins.
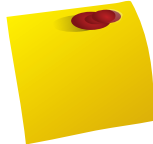
Complete Tasks
My To-Dos (Employee Dashboard)
15-20 Mins.

Manage Working Deals
My Open Events
5-10 Mins.

Move Dead Deals to Lost &
Schedule Future To-Dos for Active Deals

Middle of Shift

10-20 Mins.

Log in All New Prospects
Open Events/ (Employee Dashboard)
1 - 2 Mins. per lead

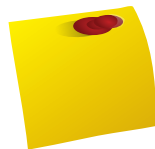### Schedule Appointments
Open Events/ (Employee Dashboard)
5-15 Mins.

Call and Email Working, Lost, and Sold Deals
in Order to Schedule New Appointments

End of Shift

10-20 Mins.

Complete Remaining Tasks
My To-Dos (Employee Dashboard)
15-20 Mins.

Review Daily Checkout Report
My To-Dos (Employee Dashboard)
1-2 Mins.

New Prospects

Fresh-Up*	1
Phone-Up*	1
Internet*	0
Other	3

0 1 2 3 4 5

Appointments

Created*	2
Scheduled*	1
Show*	1
No Show*	0
Next 72hrs*	5

0 2 4 6 8 10

Phone Calls

Completed*	21
Completed(CTI)	0
No Response*	0
Bad Phone*	0

0 6 12 18 24 30

Email Communication

Sent	9
Received	0

0 2 4 6 8 10

Make sure that all items have been completed:

☑ All To-Dos Completed
☑ All New Prospects Entered in DealerSocket
☐ All Appointments Scheduled in DealerSocket
☐ Made Sufficient Amount of Outbound Calls and Emails