

DealerSocket Sales Management - Best Practices



Beginning of Shift

20-30 Mins.

Confirm Appts
Mgr Dashboard - Sales Console
5-10 Mins.



Review Lost Deals
Employee Dashboard
5-10 Mins.



Check Sales Team To-Dos
Employee Dashboard
10-15 Mins.



Middle of Shift

10-20 Mins.

Monitor the Desk Log to verify and update customer information 5-10 Mins.



Input
Mgr.
Initials

Update
Status

Check Envelope
for Email

Check & Update
Notes

Check & Update
Close Date

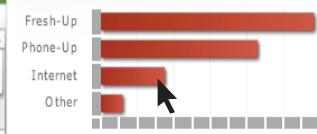
Review and track the metrics in Sales Console 5-10 Mins.

PROSPECT PITCHES - LAST 20 TRADES		
CNT	VEHICLE	MILES
40	Altima-4 Cyl. Sedan	13321
9	Altima-V6 Sedan 4D	146350
8	Murano-V6 Utility 4D	36025
3	CR-V-4 Cyl. Utility	47323
2	Tacoma Double Cab	42409

Check Prospect Trades
for Vehicle Interest

Click Bars on Phone Ups
and Internet to see new prospects

NEW PROSPECTS



TOP AGED VEHICLES		
AGE	VEHICLE	STOCK#
339	2010 Toyota Cam	TT1234
339	2010 Toyota Avail	TT0002
339	2010 Toyota Pase	TT0003
339	2010 Toyota Matrix	TT0004
339	2010 BMW 3 Serie	BB1002

Monitor Untouched
Webleads

Check Top Aged Vehicles
for Potential Buyers



Review Individual Performance in Sales Checkout 10-20 Mins.

10-20 Mins.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	5	0	2	7	7	0	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	7	0	2	26	24	4	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	4	1	2	16	15	2	3

All To-Dos Completed

All New Prospects Entered in DealerSocket

All Appointments Scheduled in DealerSocket

Made Sufficient Amount of Outbound Calls and Emails



Weekly Tasks

Review Email Capture Rate Report 10-20 Mins.

10-20 Mins.

Ross Miller	5	3	60%
Sam Rizek	17	3	18%

Click Numbers to See Details
Verify Emails logged are valid

Review Sales Activity Report

Chris McGeachie	14	80	24	408	370
Josh Gayman	14	59	13	283	106

Review New Prospects, Unsold Prospects,
Open Calls, Completed Calls,
Appointments, and Sold Units.