IDEAL a Constellation Software Company

Monthly Checklist for Dealership Sales Managers

"Make a customer, not a sale."

Week 1:

- [ ] Review sales monthly goal with the sales team
- [ ] Review Parts and Accessory sales goals with the Parts team
- [ ] Check trade-in inventory for lot rot, flat tires, and dead batteries
- [ ] Ensure warranty registration and rebates are filed for all new products
- [ ] Ensure new and used titled equipment is registered
- [ ] Ensure all trade-ins are free and clear of bank liens
- [ ] Check inventory turns by product line
- [ ] Review leads distribution and follow-up
- [ ] Review auto-renewing contracts
- [ ] Review and reflect on lost sales
- [ ] Ensure all trade-ins are moving through the shop for refurbishing
- [ ] Check price tags and ensure they're attached and accurate

Week 2:

- [ ] Weekly meeting with parts team
- [ ] Biweekly managers meeting
- [ ] Check inventory ageing report for potential clearance items
- [ ] Check trade-in inventory for lot rot, flat tires, and dead batteries
- [ ] Monthly and/or quarterly financial review compared against industry benchmarks and KPIs
- [ ] Review leads distribution and follow-up
- [ ] Marketing plan update and follow-through
- [ ] Strategic business operation planning
- [ ] Ensure warranty registration and rebates are filed for all new products
- [ ] Ensure new and used titled equipment is registered
- [ ] Ensure all trade-ins are free and clear of bank liens
- [ ] Review leads distribution and follow-up
- [ ] Check overtime for hourly employees
- [ ] Check price tags and ensure they're attached and accurate

Week 3:

- [ ] Outstanding warranty claimed/not claimed – no
- [ ] unclaimed over 10 days
- [ ] Sales inventory review
- [ ] Set sales monthly goals with sales team
- [ ] Review leads distribution and follow-up
- [ ] Check trade-in inventory for lot rot, flat tires, and dead batteries
- [ ] Ensure warranty registration and rebates are filed for all new products
- [ ] Ensure new and used titled equipment is registered
- [ ] Ensure all trade-ins are free and clear of bank liens
- [ ] Review leads distribution and follow-up
- [ ] Check price tags and ensure they're attached and accurate
- [ ] Individual 1 on 1s with staff

Week 4:

- [ ] Biweekly managers' meeting
- [ ] Strategic market planning
- [ ] Review leads distribution and follow-up
- [ ] Check trade-in inventory for lot rot, flat tires, and dead batteries
- [ ] Ensure warranty registration and rebates are filed for all new products
- [ ] Ensure new and used titled equipment is registered
- [ ] Ensure all trade-ins are free and clear of bank liens
- [ ] Make sure documentation for retail financing is in place for every deal
- [ ] Check overtime for hourly employees
- [ ] Check price tags and ensure they're attached and accurate
- [ ] Merchandising showroom and lot or sidewalk and highlight any current advertised promotions from manufacturer, distributor, or dealership

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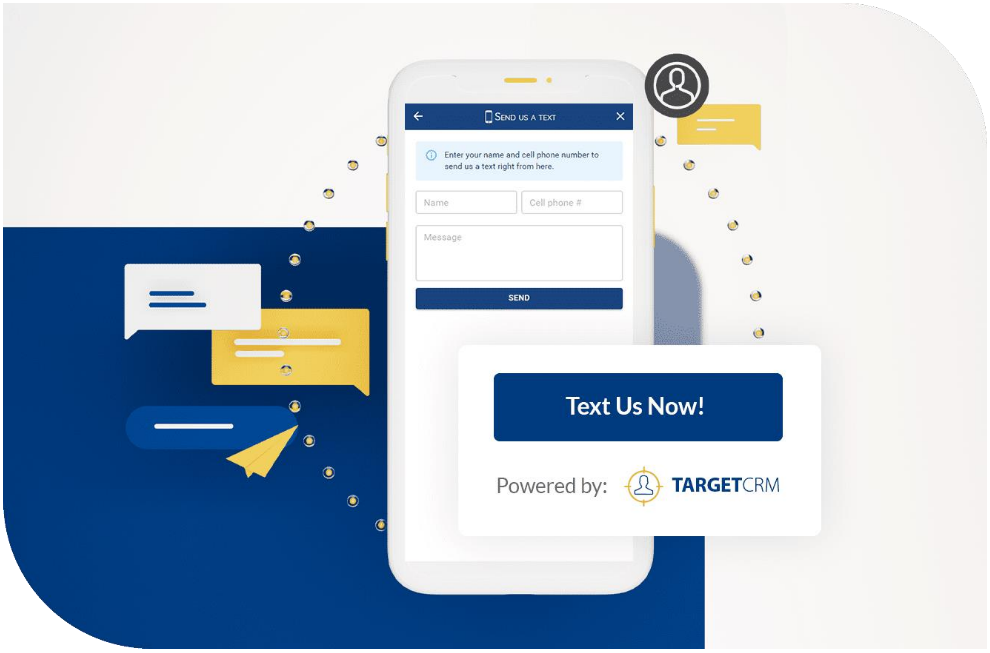
Daily:

- [ ] Follow-up with customers post-sale through call or text
- [ ] Check social marketing accounts and online reviews
- [ ] Check post-sale survey feedback
- [ ] Check text, email, and voicemail inboxes for unanswered messages
- [ ] Daily sales meeting – 10-15 minutes, be sure to review goal progress
- [ ] Replenish sold units as needed
- [ ] Ensure dealership storefront is neat and organized
- [ ] 10 minutes of quiet contemplation – no interruptions

With TargetCRM, you can communicate with customers when they want it, the way they want it.



Send targeted promotions that work, put an end to phone tag, and do more to grow your dealership's online reputation with Ideal TargetCRM.