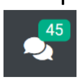
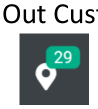
KELLEY AUTOMOTIVE GROUP

Sales Manager’s Daily DriveCentric Checklist

1. Confirm Schedules
    a. Ensure all SLCs’ schedules are accurate and up-to-date.
    b. Add/Remove Users from Vacation - DC Guide – Turning Vacation Mode On or Off
    c. Update Lead Schedules – Updating a User’s Work Schedule
2. Review the Day’s Appointments
    a. 

    b. Ensure all customers have received a confirmation – create task for SLC if not
    c. Create and Manage Appointments
3. Review Unreplied Messages
    a. 

    b. Reply, where necessary, to any time-sensitive messages
    c. Impersonate SLC, where necessary, to maintain continuity of conversation and minimize confusion
    d. Customer Card – Conversations Tab
    e. Message Impersonation
4. Inspect Pipeline
    a. Deal Review - Open each Bucket to inspect deals, confirming every deal has:
        i. Vehicle Added
        ii. Video Sent
        iii. Proper Engagement
        iv. Activity Tracking
        v. Accurate, Up-To-Date Notes
        vi. Next Steps
    b. Closely review proposal bucket with SLCs during one-on-ones to create path to close
    c. Understanding Your Pipeline
    d. Filtering Your Sales Pipeline
    e. Link Any Unlinked Deals – How to link an unlinked delivered deal from the DMS
5. Video Report
    a. Review Manager Video Report to ensure 1:1 ratio of internet leads to videos sent
    b. Inspect videos for appropriate content (pull vehicle around, hot features, contact information and professional communication/appearance)
    c. @Mention SLC if video is missing
6. Dead Deal Review
    a. 
    b. Review every single dead deal to ensure all efforts have been exhausted
    c. Rescue or delete, depending on each deal’s circumstances
7. Check Out Customers
    a. 

    b. Clear any customers who may remain “checked in”