



## ***SLC's Daily DriveCentric Checklist***

1. Clock In – [How to Clock In](#)
2. Review the Day's Appointments  

  - a.
  - b. Ensure all customers have received a confirmation – send if not
  - c. [Create and Manage Appointments](#)
3. Review Unreplied Messages  

  - a.
  - b. Reply to all relative messages, ignore those who have come to a natural end
  - c. [Customer Card – Conversations Tab](#)
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. [Understanding Your Pipeline](#)
  - c. [Filtering Your Sales Pipeline](#)
5. Check Out Customers  

  - a.
  - b. Clear any customers who may remain “checked in”
  - c. Checking Customers Out of the Floor



#### ***Dead Deal Reasons (Included in Net Deals)***

- **Bought Elsewhere** - Customer purchased vehicle from a dealership or seller outside of Kelley Automotive Group
- **Cross-Sell** - Reserved for Decatur Campus where a New Ford or CDJR vehicle is sold and no DMS integration is currently available
- **Due to Processes** - DO NOT USE. This is reserved for deals where the system automatically kills deals that do not have activity for 120 Days
- **Finance Declined** - Customer did not qualify for financing
- **Inactivity on Deal** - Manual Administrator cleanup reserved for deals with 14+ Days of no activity including notes, engagements, POWs, or next steps
- **No Agreement** - Dealership and customer could not agree to price or timing
- **Old Deal** - Administrative Use Only to be utilized for system maintenance
- **Other** - DO NOT USE. These will be monitored regularly and SLCs will be required to provide explanation to assign an appropriate Dead Deal Reason

#### ***Dead Deal Reasons (Not Included in Net Deals)***

- **Bad Contact Info** - Customer provided bad or inaccurate contact information that does not allow KAG to engage the customer on any channel
- **Bad Deal or ILM**
  - A non-sales, non-service, or non-parts related inquiry was submitted (Example: HR-Related Inquiries, SPAM Marketers, ETC.)
  - A duplicate deal originated by RouteOne Credit App that was not auto-merged and the original deal was delivered prior to a manual merge was completed
- **Dealer Purchase** - Dealer Purchase
- **Handraiser / Tradeshow** - The system inaccurately assigned a previously unknown Campaign Lead as an ILM (Internet Up) when it should have been a Campaign. Please Tag Tommy Dent in these leads to have the lead source added to campaigns
- **Service / Parts Lead** - Service or Parts Leads that are incorrectly submitted through sales channels
- **Test Lead** - Vendor or Administrator Test Leads for training or testing purposes
- **Transferred** - Customer begins the sales process in Store A and decides to pursue a vehicle/deal at Store B