

Sales Department Tune-Up



The Sales Department Tune-Up consists of a 2-day on-site Client Operations Analyst (COA) visit focused on the Sales Department, including all Sales applications except F&I (see F&I Tune-Up). The visit includes:

- Custom assessment identifying training and utilization needs
- Review of dealership processes
- Implementation of “Best Practices”
- Report outlining what the visit and assessment has found

<i>Subject</i>	<i>Process</i>	<i>Results</i>
Set-ups	Review desking and prospecting screens. Review Work-a-Quote screens with all users.	Streamline deal entry and processing. Reviewing the files will ensure current information and faster search activity. Accurate setups will ensure all needed deal information is being taken into consideration. Set-ups can be tailored to match the current manual “up sheets” that the dealership may be using.
Prospecting and Follow-ups	Review prospect entry, maintenance and management.	Ensure accurate capture and follow-up of prospects. Proper follow-up will help increase customer satisfaction and drive future sales through repeat customers. Satisfied customers will help “sell” the dealership to other potential buyers. Use of activity screen allows management to see prospects currently in showroom in real time.
Prospecting Options	Review type codes, status codes, event codes, and advertising codes.	Customize the prospect data capture screens to provide the dealership with meaningful prospect detail. Know the What, How, When and Why of your client base. Spend advertising dollars wisely by better evaluating How and Where to advertise.
Sales Follow-up Reports	Review prospect follow-up reports.	Timely follow-up with customers can help drive sales. Know when your customers are ready to buy, their birthdays, anniversaries, etc. Establishing rapport can make customers for life.

Desking	Monitor and evaluate the use of Work-a-Quote.	Streamline the desking process to provide the Sales management team with the tools and information needed to efficiently desk deals. Work-a-Quote provides a link between prospecting and F&I. Allows various set-ups used in the prospecting functions to be tied to the customer once transferred to F&I.
Desking Reports	Review the reports of sales and customer activity. Review all functional options that are available.	Provides the management team with information on sales, productivity, and profitability . Allows management team to see the effectiveness and ranking of each sales associate. Comparison between sales managers and sales associates possible.
Database Management	Check file retention, purging, and re-assigning salesperson to orphan owners.	Maintain long-term relationship with clients for future sales and referrals . Ensure needed data for follow-up is timely and accurate. Guarantee each and every customer is assigned to a salesperson for future follow-up.
Vehicle Inventory Management	Demonstrate the use of vehicle search screens.	Ready access to new and used vehicles, as well as prospective trade-in inventory. Effectively and efficiently match vehicles to prospective buyers . Search and select vehicles by specific details such as options, packages, colors.
Deal Flow	Follow a deal from start to finish.	Ensures all pertinent information is verified through the deal process. Minimize redundancies within the flow from prospecting, desking, F&I, accounting, to service.

Tune-Up Visit Overview

Dealership management will be given a comprehensive report outlining the findings of the assessment. The report will include department accomplishments and recommendations for productivity improvement.