Monthly Checklist for Sales Managers

“Make a customer, not a sale.”

# 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

# 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:

* 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



# 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.**

Graphical user interface, text, application, chat or text message

Description automatically generated

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

**Ready to learn more about TargetCRM?**

Call us at 800-737-1620