Manager Opportunities

V2.0/2018

Manager Daily Opportunities

This guide gives you suggested daily, weekly, and monthly Manager opportunities. It will help you and your dealership be successful when using the Connect CRM.

Close all Showroom Visits

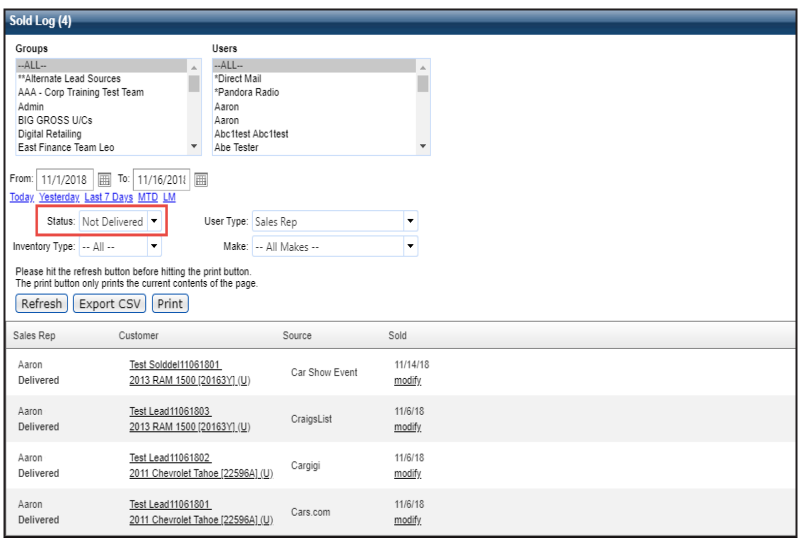
Whether a customer has been sold or not, closing the **Showroom Visit** (**CRM** > **Dashboards** > **Showroom Activity**) is essential in moving the customer forward in the car buying process.

All customer visits should be closed as soon as the visit end, if possible. Ending the **Showroom Visit** will immediately move the customer to the **Unsold Showroom**, **Sold Delivered**, **Sold Pending**, or **Sold On Order** follow up process. Ensuring all **Showroom Visit** are closed should be a part of your End of Day checkout process. For more information, see the Closing a Showroom Visit knowledge base article.

Update Sales Log

Sold customers should be appropriately marked to ensure that the correct Sold follow up process is received in a timely manner. If sold customers are not appropriately marked, the deal will be marked Delivered by the DMS but key Sold follow up tasks will be delayed. Use the **Sold Log** (**CRM** > **Dashboards** > **Sold Log**) to verify daily that deals are being updated by the DMS.

Tip: To view only the **Pending Finance** or **On Order** deals, change the **Status** drop-down to **Not Delivered**.



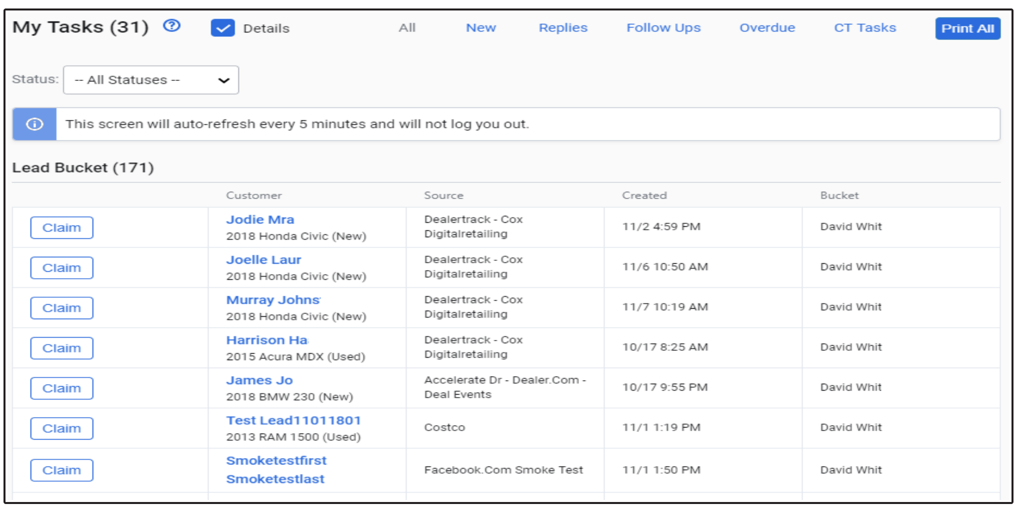
To manually mark a deal as **Delivered**, on the **Sold Deal** screen select **Delivered** from the **Deal Status** drop-down.

Deal Status	Process
Sold Delivered	Automatically triggers the **Sold (Delivered Vehicle) Follow Up** process.
Sold Pending Finance	Automatically triggers the **Sales Lead Marked Sold Pending** follow up process. The **Sold (Delivered Vehicle) Follow Up** process will not be triggered until the customer is marked Sold by the system or manually.
Sold On Order	Doesn't automatically trigger a follow up process, but a custom process can be created, and customers can be manually moved to the custom process from their Customer Dashboard.

Tip: Once a deal is marked **Delivered** and has been correctly matched to the DMS, on the **Sold Log** deal number will appear as a hyperlink.

Complete Manager Tasks

As a Manager, addressing customer related, time-critical tasks are crucial to the success of your Salespeople and dealership. Make sure to complete your own tasks to set a good example for your Sales Team.

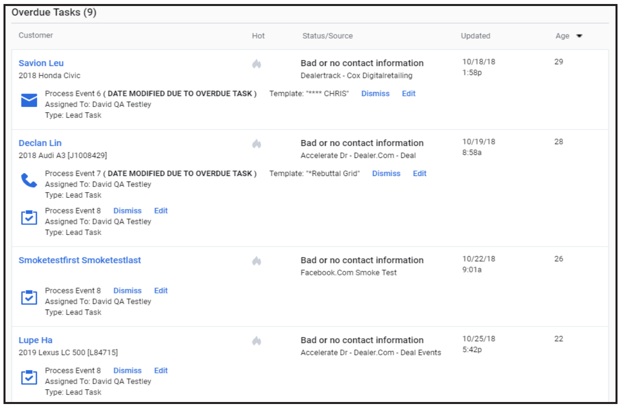


Tip: Completing Manager tasks allow for following up on customer opportunities and issues, moving customers through the process, and monitoring skate and Sales Rep Changed alerts. Also, Salespeople may be requesting Managers to mark a customer as lost or bad. Failure to do this results in improper follow up tasks continuing to fire.

Ensure Salespeople are Completing Their Tasks

All daily tasks should be closed by the end of each day. **Overdue Tasks** can be found in the **Overdue Tasks** section of the **Tasks** (**CRM** > **Tasks**) screen.

Tip: View **Overdue Tasks** as customer engagement opportunities and a chance to build rapport with customers.



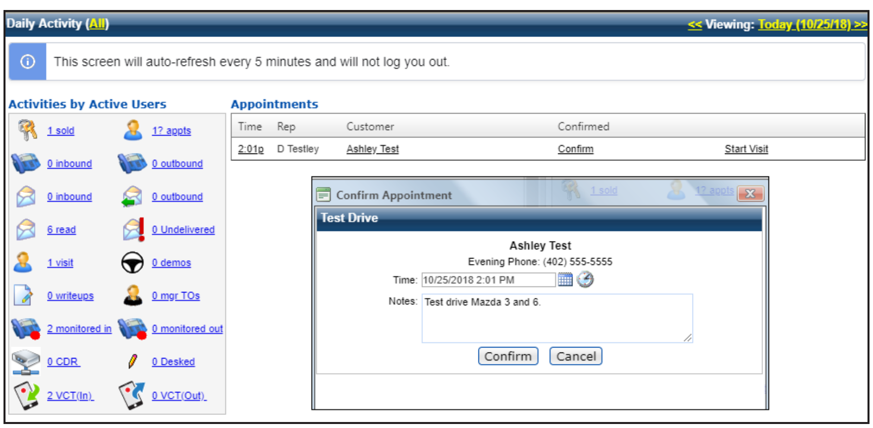
Confirm All Appointments

Confirmed appointments show at a higher rate (typically 10-20%) and are one of the easiest way to increase showroom activity and sales opportunities.

• Monitor appointments daily. If the customer does not show up for an appointment make sure to mark the appointment as missed or reschedule the appointment.

• A **Showroom Visit** is started when a customer arrives for an appointment.

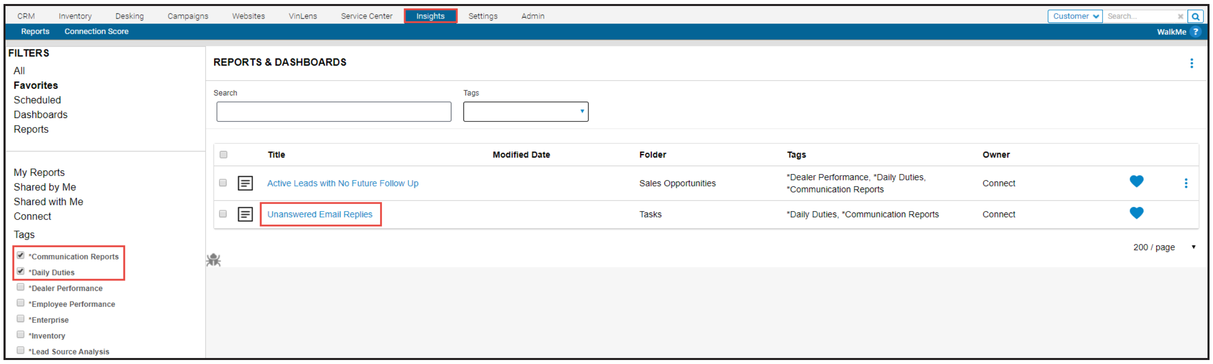
• If an appointment is canceled it can potentially stop processes based on the dealership settings. It is recommended not to cancel appointments in the **Connect CRM**, instead mark them as missed.



Monitor Unanswered Email Replies

Under the Insights tab, select the **Unanswered Email Replies** report to check if there are emails from customers that are still pending a response. Monitor this report frequently to ensure your dealership is delivering a strong customer experience.

Tip: The **Unanswered Email Replies** report can be favorited, or it can be found under the **Communication Reports** or **Daily Duties** tags.



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Manager Weekly Opportunities: Key Reports and Tasks for Managers

All reports can be found by selecting the **Insights** tab. Users can search for specific reports and favorite or tag frequently used reports for easier access at a later time. For more information, see the Insights Overview knowledge base article.

Reports

DMS to CRM Sales/Customer Matching

This report matches customer records from the DMS sold records to the Connect CRM Customer Dashboard. If a sold record is not matched to the customer record, the data will not be imported into the Connect CRM.

There are a few possible reasons why sold records couldn't be matched:

- There are duplicate records within the system
- The Buyer and Co-Buyer were switched
- A customer goes by their middle name instead of their legal name
- Customer names verse Business names

Active Leads with No Future Follow Up

This report provides active customer records that are not currently being contacted or in a follow up process. Customers with an active **Showroom Visit** and customers with upcoming appointments will show on this report, so be sure to verify the customer status before changing the process.

Tip: On the Customer Dashboard view the Notes and History section to assist in determining what actions to take.

Tasks

Merge Duplicate Customer Records

If a customer has more than 2 **Customer Dashboards** in the Connect CRM, the records need to be merged so that there is only 1 Customer Dashboard remaining. Only 2 records can be merged at a time, so this process will need to be repeated until there is only 1 Customer Dashboard. For more information, see the Merging Customer Records in Connect knowledge base article.

Check Wishlists

Are you about to go to the auction and buy cars? Check your **Wish Lists** (**CRM** > **Dashboards** > **My Wish List**) to ensure that you buy cars that your customers are looking for. Also, make sure that Salespeople are following up with customers whose Wish Lists have been matched.

Check Lease Prospects

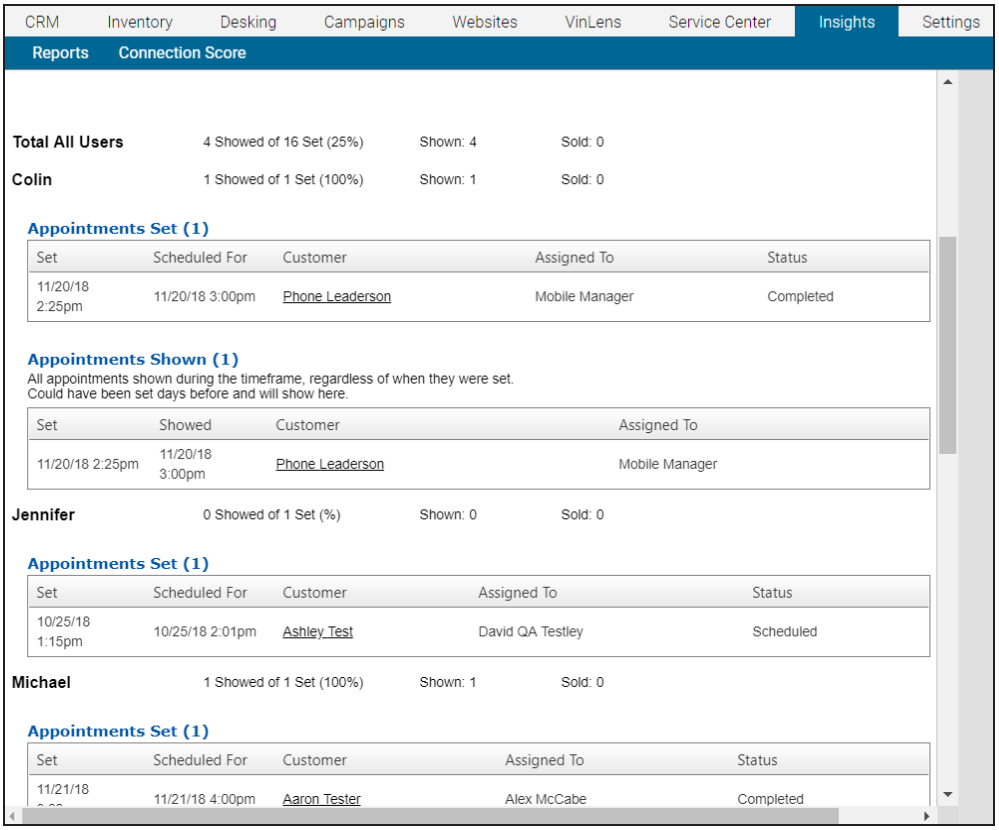
Check to see if there are any upcoming lease expiring within the next 180 days. Select **CRM** > **Customers** > **Lease Prospects** to see a list of upcoming expiring leases.

Tip: Make sure to reassign any orphan customers on this report to active Salespeople to ensure those customers are contacted.

Manager Monthly Opportunities: Additional Key Reports for Managers

Appointment Performance

This report provides the number of scheduled appointments, shown appointments, and sold appointments for a specific date range.



Lead Source ROI

This report provides in-depth metrics on the performance of each Lead Source. Leads can be grouped by lead sources type and cost per lead source. To group by lead sources type and cost per lead source, select **Settings** > **ILM/CRM settings** > **Lead Settings** and select the **ROI Settings** tab.

Tip: This report can be versioned to provide different data sets without having to create a new report each time. To version the report, open the original **Lead Source ROI** report and at the top of the screen select **New Version**.

Lead Source Performance

This report provides the days and times of when leads came in and how effective your team is doing with closing the leads.

Internet/BDC Performance

This report provides a breakdown by a team and individual users on how internet leads are being handled. BDC Performance also includes phone lead performance.

Showroom Performance Report

This report provides showroom performance by Salesperson. It is a great way to coach each Salesperson to be more effective and sell more cars by properly completing the sales process with each lead.

Showroom Capture

This report provides information on if team members are capturing customer phone numbers and emails addresses.

Tip: Strong goals to aim for are: Emails: 80% - 90% (non-internet) and Any Phone Number: 95% +

Activity Breakdown

This report provides a breakdown of opportunities and activities by a team and individual users. With this data, you can determine a Salesperson’s strengths and areas for improvement.

Manager Daily Opportunities Checklist

- ☐ **Closing Showroom Visits**
- ☐ **Update Sold Log**
- ☐ **Complete Manager Tasks**
- ☐ **Ensure Salespeople are Completing Their Tasks**
- ☐ **Confirm Appointments**
- ☐ **Monitor Unanswered Emails**