Consultant: ____________________________ Date: _____/_____/______

SALES CONSULTANT DAILY CHECKLIST

1. PREPARING FOR YOUR DAY

- ☐ Arrive 15 minutes early and walk the lot (new and used) – observe any flaws in merchandising (plates, pricing, etc.) and report to manager.
- ☐ Open Dealership website and re-familiarize with inventory. Note any changes.
- ☐ Open manufacturer websites and note any new information
- ☐ Note, then confirm any and all appointments.
- ☐ Bring out running total customer list and begin going over.

2. FOLLOW-UP

- ☐ Clean up all CRM tasks –
- ☐ Minimum 20 activities (should be easy with above)
- ☐ Contact ALL sold customers until completed (quarterly). Everyone of your sold should hear from you every 90 days.
- ☐ Spend time writing and improving e-mail and text templates.
- ☐ Get with sales manager to help complete tasks and follow-up (daily one-on-one)
- ☐ Contact Sold Customers for Review – cut and paste link to your page.

3. PROSPECTING

- ☐ Spend 30 minutes on Equity Mining contacting potential opportunities – utilize Daily Agenda for equity mining.
- ☐ Attempt to engage with two service guests – offer walkarounds, demonstrations.
- ☐ Contact previous sold and select unsold customers with pre-owned offers, new programs and incentives, etc.
- ☐ Create and distribute monthly newsletter.

4. DAILY IMPROVEMENT

- ☐ Work on walkaround sheets until complete.
- ☐ Practice Word Tracks for 30 minutes
- ☐ Read Sales Books or articles, listen to podcasts 30+ minutes.
- ☐ Study Competitive Videos