**Monthly Checklist for Dealership Sales Managers**

*“Make a customer, not a sale.”*

* Review sales monthly goal with the Sales team
* Ensure warranty registration and rebates are filed for all new products
* Check inventory turns by product line
* Review leads distribution and follow-up
* Ensure that price tags are attached to all units and accurate
* Walk the showroom and lot to ensure it is clean, organized, and presented in a way that is inviting to customers
* Ensure all units displayed are in good, sellable condition
* Approve hourly employee timesheets

# Week 1:



* Set monthly goals with the Sales team
* Individual 1-on-1s with staff
* Review leads distribution and follow-up
* Ensure warranty registration and rebates are filed for all new products
* Ensure that price tags are attached to all units and accurate
* Walk the showroom and lot to ensure it is clean, organized, and presented in a way that is inviting to customers
* Ensure all units displayed are in good, sellable condition
* Approve hourly employee timesheets

# Week 3:



# Week 4:

* Biweekly Managers Meeting
* Review leads distribution and follow-up
* Ensure warranty registration and rebates are filed for all new products
* Ensure that price tags are attached to all units and accurate
* Walk the showroom and lot to ensure it is clean, organized, and presented in a way that is inviting to customers
* Ensure all units displayed are in good, sellable condition
* Check overtime for hourly employees
* Approve hourly employee timesheets
* Review contracts in transit



# Week2:

* Biweekly Managers Meeting
* Review inventory aging report to assess pricing adjustment and reconditioning needs
* Monthly and/or quarterly financial review compared against industry benchmarks and KPIs
* Review leads distribution and follow-up
* Meet with marketing to review current campaigns
* Ensure warranty registration and rebates are filed for all new products
* Ensure that price tags are attached to all units and accurate
* Walk the showroom and lot to ensure it is clean, organized, and presented in a way that is inviting to customers
* Ensure all units displayed are in good, sellable condition
* Check overtime for hourly employees
* Approve hourly employee timesheets



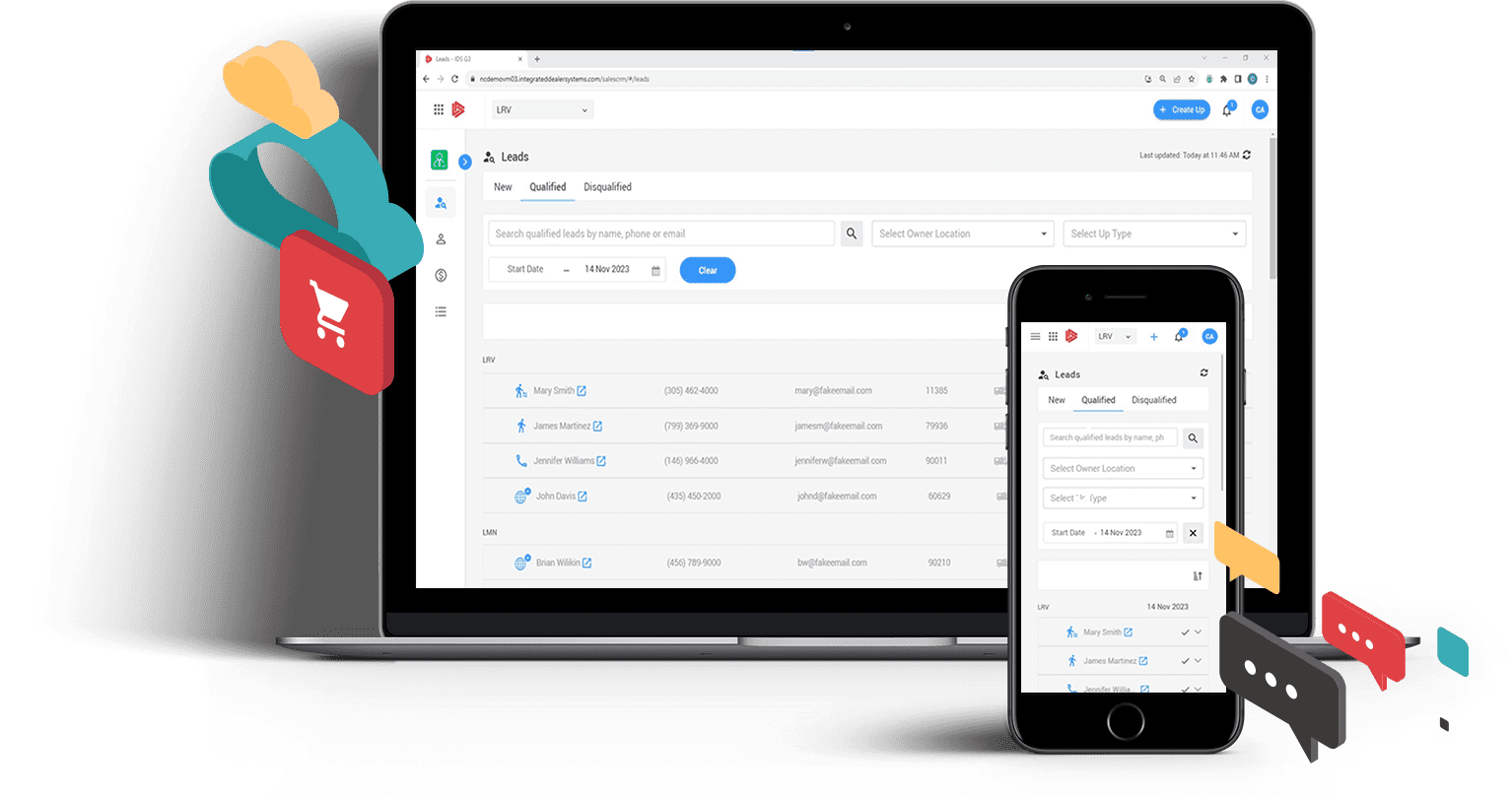
* Review current day’s deliveries with internal stakeholders
* Follow-up with customers post-sale through call or text
* Follow-up with lost opportunities to identify room for improvement in the sales process
* Check social marketing accounts and online reviews
* Check post-sale survey feedback
* Check text, email, and voicemail inboxes for unanswered messages
* Daily sales meeting – 10-15 minutes, be sure to review goal progress
* Reorganize units on lot as needed
* Ensure dealership storefront is neat and organized
* Ensure units are being locked and unlocked, and notify service manager if any needs are identified



# Daily:

**SalesCRM Online**

A simple to use yet powerful CRM that connects seamlessly with your DMS. Designed for RV, marine and trailer dealerships.



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