

CRM MAINTENANCE

WHAT IS CRM MAINTENANCE?

Dealerships spend a lot of money to drive quality sales leads. Much of the workflow that converts leads into sales depends upon a phone up being logged and assigned in CRM. Yet usually, that's like moving mountains.

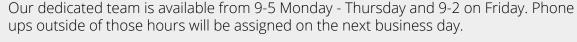


Here's where things typically go wrong: You've got hundreds of calls showing up in CRM and only a handful of them are actually true leads. Listening to all of the Service, Parts, and Vendor calls to find the sales leads would take forever, so no one does it.

With CRM Maintenance, our team logs into your CRM and combs the phone bucket or Desk Log for calls that need to be logged and assigned. From there, they will:

- Assign the call to the appropriate agent
- Append the call into an existing prospect or create a new prospect
- Indicate a source based on the tracking line label

WHAT YOU CAN EXPECT FROM US





- Throughout the day, our team will log in to your CRM and search for the new sales opportunities that have come in over the phone. We'll check to make sure a lead was created by the salesperson, so the proper follow-up can happen.
- For CRMs that don't have the functionality to append calls existing prospects, we will add a work note with a summary of the sales call.



WHAT WE NEED FROM YOU

All we need is a CRM login with admin access.