

# 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

Our dedicated team is available from 9-5 Monday - Thursday and 9-2 on Friday. Phone ups outside of those hours will be assigned on the next business day.

- 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.