**Create Task Phone will run in 2 minute(s)**

**Initial Call (Internet) - You have received a new lead. 1. Review the entire lead (check for additional notes and trim in the ADF lead) 2. Call customer immediately and ask if there is a color they would NOT consider. If no answer, Leave voice mail.**

**Create Task Email will run in 2 minute(s)**

**STOP THE CLOCK Email (Internet) - Email price quote with alternate vehicles.**

OR

**Create Task Email will run in 2 minute(s)**

**STOP THE CLOCK Email (Internet) - Email next steps with text option.**

**\* STOP THE CLOCK Email (Whats Next)**

What to expect next from

[CUSTOMER FIRST NAME],

Thank you for your inquiry. Here is what you can expect to happen next:

- One of our Customer Experience Managers will be reaching out to you soon via phone. Do you have a different phone number than what you may have provided or a preferred time that you would like us to call?

- We will be following up through email throughout the week in order to ensure that we help guide you through the process.

If you feel that you are not getting contacted soon enough, please feel free to reach out to us any time. If you prefer to communicate through text please respond to this email and let us know and we will continue via text going forward.

[SALESPERSON SIGNATURE]

**Send Email will run in 4 hour(s)**

**Survey Email (Internet) - Internet Quality Assurance check has been sent to your customer.**

**# Survey - Internet - Communication Survey**

Tell [DEALER NAME] how to help you

[CUSTOMER FIRST NAME],

Thank you for your inquiry to our dealership. I am the Internet Director for [DEALER NAME]. I am asking a quick favor of you. Would you mind answering a quick three-question survey about how we have communicated with you thus far via the Internet? I use your feedback to develop my staff and our process of helping customers like yourself. Thank you in advance for your response.

3-Question Survey

Hard Coded Signature

**Create Task Phone will run in 12 hour(s)**

**12 Hour Call (Internet) - Call customer and ask if a test drive is IMPORTANT to them. If they say NO, tell them "Most of my customers that intend to purchase a vehicle want to test drive the vehicle. Have you driven it with a family member or friend recently?" If no answer, leave voice mail.**

**Send Email will run in 1 day(s)**

**Day 1 Email (Internet) - Email has been sent to your customer.**

**Asks for a test drive.**

**\*Internet - Email 1**

Need a test drive

[CUSTOMER FIRST NAME],

I wanted to check to see if you needed to take a test drive in the [VEHICLE MODEL] you sent us an inquiry on. Please let me know and I can set up a time for you to come in. Thanks.

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 2 day(s)**

**Day 2 Call (Internet) - Call customer and ask if there were any options or accessories they were not able to include on their original inquiry. If no answer, leave voice mail.**

**Send Email will run in 3 day(s)**

**Day 3 Email (Internet) - An email has been sent to your customer. Any other options or accessories.**

**\*Internet - Email 2**

What else do you need on the car

[CUSTOMER FIRST NAME],

I need to make sure that I got everything you needed on your inquiry. Were there any additional options or accessories that you needed on the [VEHICLE MODEL]? Please let me know. Thanks.

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 4 day(s)**

**Day 4 Call (Internet) - Call customer and ask if they have a vehicle they need to SELL before they can proceed with a purchase. (Put the customer into a sellers position) Ask if we can make an offer on it. If no answer, leave voice mail.**

**Send Email will run in 5 day(s)**

**Day 5 Email (Internet) - An email has been sent to your customer. Do they have a vehicle to sell?**

**\*Internet - Email 3**

What are you driving now

[CUSTOMER FIRST NAME],

I was curious what you might be driving now. If you are driving something that you need to get rid of before you can move forward with a purchase, please let me know so we might be able to make an offer to purchase it. Thanks.

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 6 day(s)**

**Day 6 Call (Internet) - Call customer and mention that many of our customers like to know what finance options are available to them before visiting a dealership.**

**We have a stress-free online credit application process that you can take part in to learn more about your options.**

**Send Email will run in 7 day(s)**

**Day 7 Email (Internet) - Email has been sent to your customer. Email is telling the customer we have an online credit app process.**

**\*Internet - Email 5**

Before you visit DEALERNAME

[CUSTOMER FIRST NAME],

Many of our customers like to know what finance options they have before visiting a dealership. You can learn more about yours if you fill out a credit application on our website, www.DEALERNAME.com. It is simple to do, but let me know if you need any assistance with it. Thanks.

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 9 day(s)**

**Day 9 Call (Internet) - Call customer and ask if they have any additional vehicles they may be interested in (body style, functionality). If no answer, Leave voice mail.**

**Send Email will run in 11 day(s)**

**Day 11 Email (Internet) - Email has been sent to your customer. Asking if we are calling at inconvenient times.**

**\*Internet - Email 6**

What is the best time

[CUSTOMER FIRST NAME],

I had been trying to catch you, but am not sure if I am calling at inconvenient times. Is there a better time to reach you, or maybe a different number?

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 14 day(s)**

**Day 14 Call (Internet) (USED) - Review if the customer's original inquired vehicle is still available. Call customer and tell them that the dealership's inventory changes frequently. If the vehicle still is available, push them to come in before it sells. If it is not available, have an alternative vehicle to tell them about.**

**Create Task Phone will run in 14 day(s)**

**Day 14 Call (Internet) (NEW) - Review if the customer's original inquired vehicle still qualifies for any incentives. Call customer and inquire if they are aware that the manufacturer's programs and incentives change frequently. If the vehicle still qualifies, push them to take advantage of current incentives. If it does not qualify, ask if they would like to find out if they qualify for the new incentives.**

**Create Task Email will run in 15 day(s)**

**Day 15 Email (Internet) (NEW) - Review if the customer's original inquired vehicle still qualifies for any incentives. Email customer and inquire if they are aware that the manufacturer's programs and incentives change frequently. If the vehicle still qualifies, push them to take advantage of current incentives. If it does not qualify, ask if they would like to find out if they qualify for the new incentives.**

**\* General Letterhead**

Contact from [SALESPERSON FULL NAME]

[CUSTOMER FIRST NAME],

[SALESPERSON SIGNATURE]

**Create Task Email will run in 15 day(s)**

**Day 15 Email (Internet) (USED) - Review if the customer's original inquired vehicle is still available. Email customer and tell them that the dealership's inventory changes frequently. If the vehicle still is available, push them to come in before it sells. If it is not available, send alternate vehicle choices.**

**\* General Letterhead**

Contact from [SALESPERSON FULL NAME]

[CUSTOMER FIRST NAME],

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 21 day(s)**

**Day 21 Call (Internet) - Call customer and ask if there have been any changes in their vehicle requirements since their "original inquiry".**

**Send Email will run in 30 day(s)**

**Day 30 Email (Internet) - Email has been sent to your customer. Email about general incentives and inventory adjustments.**

**\*Internet - Email 7**

Our inventory has changed

[CUSTOMER FIRST NAME],

I wanted to just touch base with you about our inventory and our specials. They change frequently and if you still have interest in the [VEHICLE MODEL] or any other vehicles, I want to offer my assistance in finding the right one for you. Check out our updated inventory and specials on our website, www.DEALERSHIP.com.

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 35 day(s)**

**Day 35 Call (Internet) (NEW) - Review if the customer's original inquired vehicle still qualifies for any incentives. Call customer and inquire if they are aware that the manufacturer's programs and incentives change frequently. If the vehicle still qualifies, push them to take advantage of current incentives. If it does not qualify, ask if they would like to find out if they qualify for the new incentives.**

**Create Task Phone will run in 35 day(s)**

**Day 35 Call (Internet) (USED) - Review if the customer's original inquired vehicle is still available. Call customer and tell them that the dealership's inventory changes frequently. If the vehicle still is available, push them to come in before it sells. If it is not available, have an alternative vehicle to tell them about.**

**Send Email will run in 45 day(s)**

**Day 45 Email (Internet) - Email has been sent to your customer. Checking up and staying in front of the customer.**

**\*Internet - Email 8**

Still looking?

[CUSTOMER FIRST NAME],

I wanted to reach out again to find out if you were still interested in the [VEHICLE MODEL] you requested previously. If you do not have further interest or have a different vehicle in mind, please let me know.

[SALESPERSON SIGNATURE]

**Create Task Phone will run in 50 day(s)**

**Day 50 Call (Internet) - Call customer and ask if they have different vehicle requirements or if their situation has changed. If no answer, leave voice mail.**

**Create Task Phone will run in 60 day(s)**

**Day 60 Call (Internet) - Call customer and tell them that you have tried to get them their information, but have been unsuccessful.**

**Tell them you would love to continue being available for their research process, but we will only follow up via email going forward.**

**Create Task Generic will run in 65 day(s)**

**End of Process Alert (Internet) - This customer is now at the end of a process. Please review the notes & history and place them into the appropriate status or mark them Lost (including the reason).**

**Blue** = Task Type and Duration

**Black (Bold)** = Task Event Description

**Red (Bold)** = Email Template Name

Black (Non-bold) = Email Subject & Email Body