AutoPlay Best Practice Lead Management Workflow

autoPLAY

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1.
Lead manually loaded to
AutoPlay Sales Pipeline

2.
Lead captured from Web,
3rd Party Site or Other
Digital Source

3.
Manager recieves an
alert from AutoPlay for a
new lead

4.
Match against existing
Customers and Leads

5.
Auto Response
triggered

6.
Sales Manager allocates
the lead to Sales Team

7.
Qualify to listing and
Contact customer via
phone or Video Email

8.
Capture Wishlist details

9.
Schedule future follow up
and update Lead
Progress

10.
Schedule Test Drive
Booked in calendar &
confirm via email

11.
Greet customer, create
Test Drive Form

12.
Complete Test Drive
Form & check back linto
stock

13.
Complete Appraisal Form
- send to
Manager/Wholesaler

14.
Manager Approves
Appraisal valuations

15.
Negotiate the deal/Write
Up Form

16.
Mark as Sold & schedule
follow Up

17.
Populate customer & lead
details in the DMS

18.
Close Lead as Won

19.
Manage within DMS or
CRM

20.
Stalled Lead - Close as
Lost & add to Live Leads
Group

21.
Run through In Market
Leads

22.
Run through Live Leads
eDM & follow up
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AUTOPLAY BEST PRACTICE

1. Scan Business Card &/or Drivers Licences to capture customer details.

2. Capture Leads from ALL your Lead Sources. Categorise Lead Campaigns. Add 'Costs' to your Sources & Campaigns for $ROI.

3. AutoPlay automatically triggers a lead alert. Make sure that your lead manager accounts for all yards and times of day/days of the week.

4. Make sure to check against existing customers in your database
Check whether those customers have open leads already loaded
Matching occurs automatically on digital leads.

5. Send a basic auto response all hours to acknowledge reciept of enquiry.

6. Sales Manager allocates leads from within AutoPlay Sales Pipeline - adding notes if appropriate. It is also possible to allocate leads from the email alert recieved to your inbox. This will automatically update the lead within the Sales Pipeline application.

7. Send an AutoPlay video Email Response addressing the customer by name Utilise built in Standard Responses to get consistent replies to customers. Do not reply using Outlook/Gmail etc.

8. If unable to qualify to a listing, record details of what the customer is interested in via the Wishlist - this will automatically match against new inventory and appraisals.

9. Manage Leads by scheduling follow up and updating the Progress for easy reference on where the lead is at in the R2S. Tell us what you did, and what you are going to do.

10. When appropriate, schedule a Test Drive Booked event via the built in calendar. Email the customer using the AutoPlay video Email Response Tool to confirm their appointment time.

11. Scan Drivers Licence to populate customer details.
Present T&C's and get customer signature.

12. Complete Test Drive at the time of the Test Drive finishes, rather than using Auto Complete. If time allows send a follow up video Email Response thanking the customer for their Test Drive.

13. Salespeople create an Appraisal Form, completing valuation and reconditioning information. Depending on dealership policies - send to Manager to approve or send to wholesaler to appraise.

14. Manager or dedicated Appraiser approves valuation on Appraisal Form.

15. If the lead is progressing, user can negotiate the deal by presenting the Write Up Form for negotiation.

16. Once Sale is completed mark lead as 'Sold' and shcedule follow up using the calendar.

17. Populate customer & lead details within DMS - automatically if DMS Integration is enabled or manually if no integration exists.

18. Once Delivery and post sale follow up are completed 'Close Lead - Won'.

19. Once the lead is converted to a customer continue to manage within your DMS or CRM application.

20. If lead has stalled and is unable to be closed select the 'Close Lead - Lost' option to remove the lead from the visible Dashboard. Lost Leads can be added to the Live Leads contact group for remarketing.

21. At least once per week run through the In Market Leads process. Check any new listings that trigger matches against your previously loaded leads.

22. Once per month build targeted Live Leads audiences to remarket to your "lost leads". Set a threshold to automatically create follow-up events using the calendar when users view 2-3 + videos. Aim to follow up with a minimum of 25% of recipients that viewed videos.

CONTACT AUTOPLAY SUPPORT ON SUPPORT@AUTOPLAY.CO.NZ FOR ASSISTANCE