



Automotive Customer Relationship Management (CRM) Checklist

Initial Customer Contact & Lead Capture

Ensuring accurate lead tracking and initial engagement processes are followed.

Lead Source Code

Lead Source (e.g., Website, Referral, Walk-in)

- ☐ Website
- ☐ Referral
- ☐ Walk-in
- ☐ Phone Call
- ☐ Social Media
- ☐ Other

Date of First Contact

Time of First Contact

Contact Method (e.g., Phone, Email, Chat)

Write something...

Summary of Initial Contact Notes

Write something...

Lead Qualification & Prioritization

Defining criteria and actions for qualifying and prioritizing potential customers.

Estimated Annual Income

Enter a number...

Credit Score Range

- ☐ Excellent (750+)
- ☐ Good (700-749)
- ☐ Fair (650-699)
- ☐ Poor (Below 650)

Vehicle Interests (Select all that apply)

- ☐ Sedan
- ☐ SUV
- ☐ Truck
- ☐ Hybrid
- ☐ Electric

Purchase Timeline

- ☐ Within 1 Month
- ☐ Within 1-3 Months
- ☐ Within 3-6 Months
- ☐ 6+ Months

Initial Contact Date

Enter date...

Sales Follow-Up & Engagement

Tracking and executing scheduled follow-up activities for each customer lead.

Initial Contact Date

Enter date...

Contact Method

- ☐ Phone
- ☐ Email
- ☐ In-Person
- ☐ Text Message

Scheduled Follow-Up Time

Enter time...

Follow-Up Status

- ☐ Scheduled
- ☐ Completed
- ☐ Cancelled
- ☐ Pending

Follow-Up Notes/Summary

Write something...

Number of Follow-Up Attempts

Enter a number...

Last Follow-Up Date

Enter date...

Sales Process Adherence

Verifying compliance with standardized sales procedures and documentation requirements.

Sales Process Stage

- ☐ Initial Contact
- ☐ Needs Assessment
- ☐ Vehicle Presentation
- ☐ Test Drive
- ☐ Negotiation
- ☐ Closing
- ☐ Delivery

Estimated Sale Price

Enter a number...

Initial Contact Date

Enter date...

Last Communication Time

Enter time...

Financing Method

- ☐ Cash
- ☐ Loan
- ☐ Lease

Notes on Customer Interaction

Write something...

Service Appointment Scheduling & Reminders

Automating and tracking service appointments and reminder notifications.

Appointment Date

Enter date...

Appointment Time

Enter time...

Service Type

- ☐ Oil Change
- ☐ Tire Rotation
- ☐ Brake Inspection
- ☐ Diagnostic Scan
- ☐ Other

Estimated Labor Hours

Enter a number...

Reminder Method

- ☐ SMS
- ☐ Email
- ☐ Phone Call

Reminder Days Before

Enter a number...

Reminder Send Time

Enter time...

Customer Satisfaction Surveys & Feedback

Ensuring timely distribution and analysis of customer satisfaction surveys.

Overall Satisfaction (1-10)

Enter a number...

How would you rate our sales representative?

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

How would you rate our service advisor?

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

What did we do well?

Write something...

What could we improve?

Write something...

Which of the following aspects of your experience were important to you?

- ☐ Communication
- ☐ Professionalism
- ☐ Efficiency
- ☐ Cleanliness
- ☐ Value for money

Date of Interaction

Enter date...

Time of Interaction

Enter time...

CRM Data Entry & Accuracy

Maintaining accurate and complete customer data within the CRM system.

Customer First Name

Write something...

Customer Last Name

Write something...

Vehicle Year

Enter a number...

Vehicle Mileage

Enter a number...

Customer Type (Retail/Wholesale)

☐ Retail

☐ Wholesale

Date of First Contact

Enter date...

Notes/Special Requests

Write something...

Reporting & Analytics Review

Regularly reviewing CRM reports to identify trends and areas for improvement.

Conversion Rate (%)

Enter a number...

Average Deal Size (\$)

Enter a number...

Customer Acquisition Cost (\$)

Enter a number...

Report Period

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Yearly

Report Generation Date

Enter date...

Key Observations & Insights

Write something...

Primary Marketing Channel Performance

- ☐ Website
- ☐ Social Media
- ☐ Email Marketing
- ☐ Paid Advertising
- ☐ Referrals

CRM User Training & Proficiency

Ensuring all users are adequately trained and proficient in using the CRM system.

Training Hours Completed

Enter a number...

Training Module 1: Basic CRM Navigation

- ☐ Completed
- ☐ In Progress
- ☐ Not Started

Training Module 2: Lead Management

- ☐ Completed
- ☐ In Progress
- ☐ Not Started

Training Module 3: Reporting and Analytics

- ☐ Completed
- ☐ In Progress
- ☐ Not Started

Last Training Session Date

Enter date...

Feedback on Training Content

Write something...

Confidence Level (Data Entry)

- ☐ Very Confident
- ☐ Confident
- ☐ Neutral
- ☐ Somewhat Confident
- ☐ Not Confident

Data Security & Compliance

Adhering to data privacy regulations and security protocols within the CRM environment.

Last Data Security Audit Date

Enter date...

Compliance Framework Adhered To (e.g., GDPR, CCPA)

- ☐ GDPR
- ☐ CCPA
- ☐ Other (Specify)

Summary of Data Security Policies & Procedures

Write something...


Number of Users with Admin Access to CRM

Enter a number...

Data Encryption Methods Implemented

- ☐ Encryption at Rest
- ☐ Encryption in Transit
- ☐ Two-Factor Authentication

Data Security Audit Report (if applicable)

 Upload File