



Automotive Sales Prospect Follow-Up Checklist

Initial Contact & Qualification

Steps to ensure the prospect is a genuine lead and aligns with dealership targets.

Initial Contact Date

Contact Method

- ☐ Phone
- ☐ Email
- ☐ Website Form
- ☐ In-Person

Prospect First Name

Prospect Last Name

Estimated Budget (Range)

Enter a number...

Vehicle Interest (Primary)

- ☐ Sedan
- ☐ SUV
- ☐ Truck
- ☐ Hatchback
- ☐ Van
- ☐ Other

Interested Features (Select All That Apply)

- ☐ Safety Features
- ☐ Fuel Efficiency
- ☐ Technology Package
- ☐ Performance
- ☐ Luxury

Needs Assessment & Vehicle Matching

Identifying the prospect's requirements and suggesting suitable vehicle options.

Describe Customer's Primary Vehicle Needs (e.g., family, commute, off-road)

Write something...

Approximate Budget (in \$)

Enter a number...

Desired Body Style

- ☐ Sedan
- ☐ SUV
- ☐ Truck
- ☐ Hatchback
- ☐ Minivan
- ☐ Coupe

Desired Features (Select all that apply)

- ☐ Navigation System
- ☐ Sunroof/Moonroof
- ☐ Leather Seats
- ☐ Advanced Safety Features (e.g., adaptive cruise control)
- ☐ Premium Sound System
- ☐ Heated Seats

Approximate Mileage Driven Per Year

Enter a number...

Test Drive Scheduling & Execution

Managing the test drive process and gathering feedback.

Scheduled Test Drive Date

Enter date...

Scheduled Test Drive Time

Enter time...

Salesperson Assigned

- ☐ Salesperson 1
- ☐ Salesperson 2
- ☐ Salesperson 3

Vehicle Model for Test Drive

Write something...

Customer Name for Test Drive

Write something...

Customer Notes/Special Requests

Write something...

Test Drive Route Type

- ☐ City Streets
- ☐ Highway
- ☐ Combination

Estimated Test Drive Duration (minutes)

Enter a number...

Price Negotiation & Financing Options

Presenting pricing, exploring financing alternatives, and addressing concerns.

Offered Price

Enter a number...

Dealer's Counteroffer

Enter a number...

Down Payment Amount

Enter a number...

Interest Rate (APR)

Enter a number...

Loan Term (in months)

Enter a number...

Financing Source

- ☐ In-House Financing
- ☐ Bank/Credit Union
- ☐ Other

Notes on Negotiation Strategy

Write something...

Trade-In Appraisal (if applicable)

Evaluating trade-in value and incorporating it into the deal.

Vehicle Mileage

Enter a number...

Vehicle Year

Enter a number...

Vehicle Condition (Overall)

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

Detailed Condition Notes (Dents, Scratches, etc.)

Write something...

Appraised Value

Enter a number...

Supporting Photos (Exterior, Interior)

 Upload File

Trade-In Status

- ☐ Accepted
- ☐ Rejected
- ☐ Negotiating

Paperwork & Contract Review

Ensuring accuracy and clarity of all documentation.

Prospect Full Name**Vehicle VIN****Sale Price****Down Payment****Interest Rate****Contract Start Date****Customer Signature**

Salesperson Signature

Delivery & Handover

Preparing the vehicle and providing comprehensive handover instructions.

Delivery Date

Delivery Time

Vehicle Condition Notes (pre-delivery inspection)

Customer Walkaround Notes

Features Explained to Customer (check all that apply)

- ☐ Infotainment System
- ☐ Safety Features
- ☐ Warranty Information
- ☐ Maintenance Schedule
- ☐ Connected Services

Salesperson Signature

Customer Signature (acknowledgment)

Vehicle Odometer Reading at Delivery

Post-Sale Follow-Up

Checking on customer satisfaction and identifying potential referrals.

Follow-Up Call Scheduled Date

Customer Satisfaction Level

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

Customer Feedback & Comments

Write something...

Referral Likelihood

- ☐ Highly Likely
- ☐ Likely
- ☐ Neutral
- ☐ Unlikely
- ☐ Highly Unlikely

Days Since Purchase

Enter a number...