



# Automotive Sales Team Performance Tracking Checklist

## Lead Generation & Qualification

Tracking the source and quality of leads entering the sales funnel.

### Total Leads Generated

### Lead Source (Primary)

- ☐ Website
- ☐ Referral
- ☐ Social Media
- ☐ Paid Advertising
- ☐ In-Store Visit
- ☐ Other

### Website Traffic (Unique Visitors)

### Lead Source (Secondary - Select All That Apply)

- ☐ Google Ads
- ☐ Facebook Ads
- ☐ Instagram Ads
- ☐ Email Marketing
- ☐ Partnerships

### Lead Status (Initial)

- ☐ New
- ☐ Contacted
- ☐ Qualified
- ☐ Unqualified

### Initial Lead Notes

Write something...

## Prospect Engagement

Monitoring contact frequency, methods, and responsiveness with prospects.

### Number of Initial Contacts (Calls/Emails/Texts)

Enter a number...

### Date of Last Contact

Enter date...

### Time of Last Contact

Enter time...

### Contact Method Used

- ☐ Phone Call
- ☐ Email
- ☐ Text Message
- ☐ Social Media
- ☐ In-Person

### Notes on Prospect Interaction

Write something...

### Follow-Up Appointments Scheduled

Enter a number...

### Prospect Engagement Level

- ☐ Highly Engaged
- ☐ Moderately Engaged
- ☐ Minimally Engaged

## Test Drive Completion

Measuring the number of test drives scheduled and completed.

### Number of Test Drives Scheduled

Enter a number...

### Number of Test Drives Completed

Enter a number...

### Test Drive Completion Rate (%)

Enter a number...

### Reason for Missed Test Drive (if applicable)

- ☐ Prospect No-Show
- ☐ Scheduling Conflict
- ☐ Vehicle Unavailable
- ☐ Other (Specify in Long Text)

### Details/Notes about Test Drive Experience (if 'Other' selected above)

Write something...

### Scheduled Test Drive Date

Enter date...

### Scheduled Test Drive Time

Enter time...

## Presentation & Demonstration

Evaluating the thoroughness and effectiveness of vehicle presentations.

### Presentation Opening Summary

Write something...

### Key Features Highlighted (count)

Enter a number...

### Customer Needs Addressed (Select all that apply)

- ☐ Fuel Efficiency
- ☐ Safety Features
- ☐ Technology Integration
- ☐ Cargo Space
- ☐ Comfort & Convenience
- ☐ Styling

### Test Drive Request (Yes/No - 1/0)

Enter a number...

### Customer Questions/Concerns

Write something...

### Overall Presentation Rating (Customer)

☐ Excellent

☐ Good

☐ Fair

☐ Poor

### Presentation Date

Enter date...

## Negotiation & Closing

Tracking negotiation strategies and closing rates.

### Initial Offer Price

Enter a number...

### Final Agreed Price

Enter a number...

### Down Payment Amount

Enter a number...

### Trade-in Value (if applicable)

Enter a number...

### Negotiation Strategy Used

- ☐ Value-Based
- ☐ Competitive Pricing
- ☐ Benefit Highlighting
- ☐ Loss Leader

### Summary of Negotiation Notes

Write something...

### Closing Method Used

- ☐ Assumptive Close
- ☐ Summary Close
- ☐ Alternative Close
- ☐ Urgency Close

## Finance & Insurance (F&I) Process

Monitoring F&I product offerings and sales success.

### Finance Application Submission Rate

Enter a number...

### Average F&I Product Penetration Rate

Enter a number...

### Average F&I Profit Per Contract

Enter a number...

### Primary Financing Source Utilized

- ☐ Bank A
- ☐ Bank B
- ☐ Captive Lender
- ☐ Credit Union

### F&I Products Offered and Sold

- ☐ Extended Warranty
- ☐ Gap Insurance
- ☐ Maintenance Contract
- ☐ Tire & Wheel Protection
- ☐ Paint Protection

### Notes on Customer Interactions and Concerns

Write something...

### Application Submission Date

Enter date...



# Customer Follow-Up & Satisfaction

Assessing post-sale follow-up activities and customer feedback.

## Initial Follow-Up Date

Enter date...

## Follow-Up Method

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

## Days Since Last Contact

Enter a number...

## Notes from Follow-Up Conversation

Write something...

## Customer Satisfaction Level

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

### Reason for Dissatisfaction (if applicable)

Write something...

### What could we have done better?

- ☐ Faster response time
- ☐ More product knowledge
- ☐ Improved communication
- ☐ Better pricing
- ☐ More convenient service

### Salesperson Signature

## Sales Metrics & KPIs

Reviewing key performance indicators such as units sold, gross profit, and customer acquisition cost.

### Units Sold - New

Enter a number...

### Units Sold - Used

Enter a number...

### Gross Profit per Unit

### Average Deal Size

### Customer Acquisition Cost (CAC)

### Conversion Rate (Leads to Sales)

### Reporting Date

## Training & Development

Tracking individual training progress and skill development.

### Training Start Date

### Training End Date

Enter date...

### Training Module Completed

- ☐ Product Knowledge
- ☐ Sales Process
- ☐ Customer Service
- ☐ Negotiation Skills
- ☐ Finance & Insurance
- ☐ Compliance

### Training Hours Completed

Enter a number...


### Trainer Feedback

Write something...

### Areas for Improvement

- ☐ Product Knowledge
- ☐ Closing Techniques
- ☐ Customer Relationship Management
- ☐ Lead Generation
- ☐ Presentation Skills

**Training Certificate (Optional)**

 Upload File

# Compliance & Ethical Standards

Ensuring adherence to legal and ethical sales practices.

**Adherence to Truth-in-Advertising Laws?**

- ☐ Yes
- ☐ No
- ☐ N/A

**Compliance with Fair Credit Reporting Act (FCRA)?**

- ☐ Yes
- ☐ No
- ☐ N/A

**Number of Customer Complaints Received (Related to Ethical Concerns)**

Enter a number...

**Date of Last Ethics Training for Sales Team**

Enter date...


**Summary of any Recent Ethical Concerns or Violations**

Write something...

**Documentation of Disclosures Provided to Customers (e.g., Fees, APR)?**

- ☐ Complete & Accurate
- ☐ Partially Complete
- ☐ Incomplete

**Supporting Documentation (e.g., Disclosures, Contracts)**

 Upload File