SAMPLE READOUT · FICTIONAL EXAMPLE

What you get at the end of an audit.

A shortened example of the readout. The business, people and numbers are made up to show the format. No client information is used.

Summit Ridge Auto Group

FICTIONAL EXAMPLE

WORKFLOW REVIEWED: INTERNET LEAD TO FIRST APPOINTMENT

HOW THE WORK FLOWS TODAY

Step 1
Lead arrives
Website form or third-party site, into the CRM

Step 2
Auto-reply
CRM sends a template email within a minute

Step 3 STALLS HERE
Assignment
After 6 PM, leads wait for the morning BDC lead to assign them

Step 4
First call
Assigned rep calls and logs the attempt

Step 5
Appointment
Set in the CRM calendar and confirmed by text

EVIDENCE REVIEWED

- 4 interviews: BDC lead, two reps, sales manager
- CRM export of 30 days of internet leads, names removed
- Screen-share of the assignment rules and the BDC dashboard
- Two weeks of the manager's morning huddle notes

The issue: finding 1 of 6

SUPPORTING OBSERVATIONS

Evening leads have no assigned owner until the next morning. For 41 of the 112 evening leads in the export, we could not verify timely contact from the records reviewed.

BUSINESS IMPACT

If those leads aren't being called promptly, the dealership is paying for

leads it isn't working. The gap starts at the assignment step.

RECOMMENDED PRIORITY

High. It is low cost to fix and affects every evening lead.

OWNER AND NEXT STEP

BDC lead names an evening owner and a backup this week.

> **Limitation:** some reps call from their cell phones and log the call late or not at all, so part of the gap may be missing activity logs rather than missing calls. Fix #3 tests this.

THREE FIXES, RANKED

#1 **Name an evening owner.**
One rep per night owns new leads until 9 PM, with a backup. Low cost, starts this week.

#2 **Turn on after-hours round-robin.**
The CRM already supports it. Leads go straight to the evening owner instead of a holding queue.

#3 **Log every call in the CRM.**
Use the click-to-call the dealership already pays for, then compare two weeks of logs to confirm the real gap.

30-DAY PLAN

WHEN	WHAT	OWNER
Week 1	Set the evening owner and backup schedule	BDC lead
Week 2	Turn on after-hours round-robin; test with a fake lead	CRM admin
Weeks 2 to 3	Move all calls to click-to-call; check daily in huddle	Sales manager
Week 4	Re-pull the same report and compare to the baseline	BDC lead, with JZ