

BDC Guidelines

- When a customer contacts us. If they mention that they bought a vehicle from us previously, look up the customer and find out the salesman. If they are still here ask the customer if they would like to continue to work with them.
- If they do not mention that they bought their car from us and you determine that they did when you log the customer you are not required to follow back up to try to get the previous salesman involved.
- You must attend the 8A.m Friday morning meetings unless you have set it up with a sales manager that you will not be there ahead of time.
- Any questions that the customer have about discounts or trade value need to go through your team sales manager or sales manager that is available.

EMAILS/CHATS

- BDC rep on the early shift gets all emails that came in after close the night before. After that there is a scheduled time for who gets incoming emails/chats throughout the day.

Email Shifts:

- Monday 8-5 shift gets emails 8-2; 12-8 shift gets emails 2-8
- Tuesday and Wednesday 8 – 6:30 shift gets emails 8-2 and 9 – 8 shift gets emails 2 – 8
- Thursday 8-6:30 shift gets emails 8 – 2; 12- 8 shift gets emails 2 – 8
- Friday 8 – 5 shift gets emails 8 – 12; 9 – 6:30 shift gets emails 12-4; 1:30 – 8 shift gets emails 4 – 8
- Saturday 8 – 5 shift gets emails 8-12; 9 – 6:30 shift gets emails 12 – 4; 11 – 8 shift gets emails 4 – 8
- Sunday 10 – 6 shift gets emails 10 – 2; 12 – 6 shift gets emails 2 - 6
- If you are going onto your days off you are not in email rotation.
- Chat leads go to whoever is scheduled for emails. If they don't answer in 10 seconds or are out of the office it is fair game

- All email leads need to be answered within 15 minutes. Help each other out if you aren't on leads and you notice one comes in. If an email is not answered within 30 minutes it becomes fair game for other BDC reps
- Ideally you need to contact your customer at least 20 times in a 90 day period and within every 14 days. There should be at least five contact attempts within first 7 days. 1st week: each email accompanied with a phone call all depending if there is both a phone number and email address. 2nd week: you need to contact the customer three times. 3rd week: three contacts 4th week: three contacts. After that at least once per week. If you are getting no feedback from a lead after 2-4 weeks than you can assign the task to another BDC rep for follow up when you are done trying.
- You are responsible to follow up with your team mates email replies when the customer responds back on their days off. That customer stays with the person that had the lead previously.

PHONE

- Incoming calls go in rotation. Fresh incoming phone calls also need follow up. The first week is the most important you should contact the customer at least 4 times in the first seven days than once a week there after until you get to the 30day mark than at least every 30days or assign task to another BDC rep for follow up. (See Email guidelines)
- If you are not #1 for a phone call wait 10 seconds before you answer (unless you are the only one in the office). Give the BDC rep who is up the opportunity to answer first. Calls go to the next rep only if the previous call was a fresh lead.
- You are responsible to follow up with your team mate's phone replies when the customer responds back on their days off. That customer stays with the person that had the lead previously.

SHOWROOM FOLLOW UP

- 24HR follow up calls from the previous day should be made first unless you need to help a customer that is here or working a deal with a customer.
- Follow up with your own Teams customers and communicate with the teams sales managers on any customer objections etc.
- follow up with your own appointment shows regardless which team they worked with
- PAYDAY customers get split between first 2 BDC Reps scheduled in the office for follow up

APPOINTMENTS/SOLD

- All customers that say they have bad credit start with Parker Auto Credit before they are scheduled for retail unless otherwise directed by sales manager.
- You can schedule appointments for your team's sales people as long as the sales manager is involved in who gets the appointment. If the appointment is going to come in within the hour of the time you set the appointment then that appointment goes to number one in the up rotation. EXCEPTION: If the customer has special circumstances or requests that requires something to be set up in advance. This is determined by sales manager
- Lease customers must be scheduled with a sales manager only so they can go over their lease options before a sales person can take them over. EXCEPTION: A lease customer contacts us requesting to trade out of their vehicle
- Only ONE Appointment may be taken per customer during one Calendar Month.
- If a customer comes in and asks for you then you get the appointment.
- If a customer comes in and does not ask for you and you don't have an appointment scheduled with them you may take credit for an appointment if:

It is an email or phone lead that you have been following up with properly and last contact is within 7 days

Showroom up that you have followed up with and helped to further the deal and last contact is within 7 days (Left message does not count as furthering the deal)

Campaign up that you created, followed up with and have contact within 7 days

During the 1st month of lead being opened the above timeline is 7 days. 2nd month is 14 days. 3rd month and longer will be 21 days.

- If you have an appointment show up on your days off another BDC rep will do a courtesy follow up call if they do not buy and the deal will stay with you.
- You are responsible to call your Teams New car Sold Follow ups
- Orders

Follow up at least every 2 weeks both yours and teams orders. No second show on your orders. Do not get paid on show or delivery if you were not originally involved.

ACTIVE with no contact/INACTIVE LEADS

- When you mark a lead inactive for any reason that lead is no longer your lead unless they call, email or come in **AND** ask for you.
- After 14 days of no contact(21 days after 1 month) that lead becomes fair game for follow up by any other BDC member unless there is a specific note with a reason for the lack of contact
 - *appointment far out in the future
 - *customer on vacation or out of town
 - *legitimate reason for no contact
 - *Lease/term end Customers don't require follow up every 14 days but are fair game after 1 month of no notes in the system and should be contacted at least every month

DAILY SALES REVIEW

- Opportunity review with each salesman on your team
- Review daily activities with your Sales manager
- Attend your shift change meetings
- Confirm appointments and leads with your team