

Salesperson's Organizational Planbook

**A Complete System
for Organizing
Your Day**



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INSTRUCTIONS

Welcome to the expanded edition of the **Salesperson's Organizational Planbook**. For those familiar with the original edition, please note that all categories remain the same, however, some have been expanded and relocated to the back of the book. In addition, a statistics section has been added to help you plot the growth of your business.

Today's Goals

Each morning, write down the number of Ups, Sales, Deliveries, Follow-Up Calls, Prospect Calls, and Mailouts you intend on making that day.

Today's Totals

At the end of each day, record the actual results of your efforts.

Things To Do List

List all of the tasks you need to accomplish for that day. Remember to transfer all unfinished business from previous days. Once each task is completed, note its completion by striking through with a yellow highlight marker. This allows you to view the tasks you've completed.

Phone-Ups

Record all of the Phone-Ups and nature of call you receive that day. Review this list often and follow-up for the purpose of setting appointments and making sales.

Follow-Ups

List all of the Follow-Up Calls you need to make that day, and purpose for calling. Then make a notation if your call was successful, and when you need to follow-up again.

Appointment

Record all appointments you've scheduled along with a phone number in order to confirm the appointment.

Ups

Record the names and purpose of visit of all new prospects that visited the dealership.

Want List

List all vehicles requested by customers that are not part of your current inventory and review this list often. In addition to doing a locator search, make a practice of taking this list with you when you take your daily inventory walk.

Prospect Calls

A steady number of prospect calls should be made daily in order to increase your client base. Although prospecting is never easy, the more calls you make, the easier it becomes. Develop a script to help make your calling easier and more accepting to the prospect.

Mailouts

Mailouts are a great source for introducing yourself and keeping your name alive with future prospects and current customers. Make sure you record each Mailout including routine paperwork.

Customer Log

In addition to recording the sale, make certain you've recorded all other pertinent information about the customer before he/she takes delivery. This will allow you to develop future business, and give you more information for following-up.

— Instructions continued on reverse side —

INSTRUCTIONS

Statistics

The Statistics section of the planbook will help you predict how to increase your sales and profits. By mathematically tracking each month, you can determine where improvement or enhancement needs to take place. Follow this step-by step process:

1. Fill in the dates at the top of the Weekly Statistics sheet.
 2. Record each day's activities and source of business.
 3. At the end of each week, total all of the categories.
 4. Transfer the weekly totals to the corresponding week on the Weekly Statistical Summary sheet.
 5. At the end of the month, total the categories.
 6. Transfer the totals to the Monthly Statistical Summary sheet.
 7. Calculate the Closing Ratios, Total Commissions, and Gross Averages.
 8. Plot Total Monthly Deliveries and Commissions on the respective graphs, bringing forward Totals from the previous months.
- If you want to increase your sales, it may be as easy as increasing your numbers.
 - Watch for discrepancies in each month regarding your sales and profits. If you notice your sales dropping, look to see where your statistics may be fluctuating and adjust them accordingly.

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
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Date _____

Phone-Ups

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Phone: Hm _____
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Appointment Date _____

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Appointment Date _____

Follow-Ups

Name	Phone	Reason

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Phone-Ups

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Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

8:00am _____
8:30am _____
9:00am _____
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Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
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Type of Vehicle _____
Trade-In _____

Name _____
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 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
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City _____ State ____ Zip _____
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Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
6. _____	18. _____
7. _____	19. _____
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10. _____	22. _____
11. _____	23. _____
12. _____	24. _____

Date _____

Phone-Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
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Type of Vehicle _____
Trade-In _____
Appointment Date _____

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Address _____
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 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

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Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

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Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
6. _____	18. _____
7. _____	19. _____
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Date _____

Phone-Ups

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
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Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
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Type of Vehicle _____
Trade-In _____
Appointment Date _____

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Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

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Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
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6. _____	18. _____
7. _____	19. _____
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11. _____	23. _____
12. _____	24. _____

Date _____

Phone-Ups

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
 Address _____
 City _____ State ____ Zip _____
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 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
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 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
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 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

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Name _____
Address _____
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Phone: Hm _____
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Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
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12. _____	24. _____

Date _____

Phone-Ups

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
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Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
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Appointment Date _____

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Appointment Date _____

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Type of Vehicle _____
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Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

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Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
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7. _____	19. _____
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Date _____

Phone-Ups

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Type of Vehicle _____
Trade-In _____
Appointment Date _____

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Appointment Date _____

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Follow-Ups

Name	Phone	Reason

Date _____

Appointments

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Today's Goals

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Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
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Mailouts _____

Today's Totals

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Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

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Date _____

Phone-Ups

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Appointment Date _____

Name _____
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Name _____
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Follow-Ups

Name	Phone	Reason

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Appointments

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Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
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Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
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Things To Do List

1. _____	13. _____
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Phone-Ups

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Appointment Date _____

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Follow-Ups

Name	Phone	Reason

Date _____

Appointments

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Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

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Phone-Ups

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Appointment Date _____

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Name	Phone	Reason

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Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
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Today's Totals

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Sales _____
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Mailouts _____

Things To Do List

1. _____	13. _____
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Date _____

Phone-Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
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Appointment Date _____

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Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

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Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
6. _____	18. _____
7. _____	19. _____
8. _____	20. _____
9. _____	21. _____
10. _____	22. _____
11. _____	23. _____
12. _____	24. _____

Date _____

Phone-Ups

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

8:00am _____
8:30am _____
9:00am _____
9:30am _____
10:00am _____
10:30am _____
11:00am _____
11:30am _____
12:00pm _____
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10:00pm _____

Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
6. _____	18. _____
7. _____	19. _____
8. _____	20. _____
9. _____	21. _____
10. _____	22. _____
11. _____	23. _____
12. _____	24. _____

Date _____

Phone-Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

8:00am _____
8:30am _____
9:00am _____
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Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
6. _____	18. _____
7. _____	19. _____
8. _____	20. _____
9. _____	21. _____
10. _____	22. _____
11. _____	23. _____
12. _____	24. _____

Date _____

Phone-Ups

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Name _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

8:00am _____
8:30am _____
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Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
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7. _____	19. _____
8. _____	20. _____
9. _____	21. _____
10. _____	22. _____
11. _____	23. _____
12. _____	24. _____

Date _____

Phone-Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

8:00am _____
8:30am _____
9:00am _____
9:30am _____
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10:30am _____
11:00am _____
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Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
6. _____	18. _____
7. _____	19. _____
8. _____	20. _____
9. _____	21. _____
10. _____	22. _____
11. _____	23. _____
12. _____	24. _____

Date _____

Phone-Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Appointment Date _____

Follow-Ups

Name	Phone	Reason

Date _____

Appointments

8:00am _____
8:30am _____
9:00am _____
9:30am _____
10:00am _____
10:30am _____
11:00am _____
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Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Want List

Date	Name	Phone	Vehicle	Cost

Want List

Date	Name	Phone	Vehicle	Cost

Prospect Calls

Date	Name	Phone	Outcome

Prospect Calls

Date	Name	Phone	Outcome

Mailouts

Date	Name	Phone	Follow-Up Information

Customer Log

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Customer Log

Name _____
 Spouse _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
 Trade-In _____
 Date Delivered _____ Stock # _____
 Gross Profit _____ Commission _____
 Husbands Birthday _____
 Wifes Birthday _____
 Childrens Birthday _____
 Childrens Birthday _____
 Childrens Birthday _____
 Anniversary _____
 Other Vehicles in Household _____
 Other Vehicles in Household _____

Name _____
 Spouse _____
 Address _____
 City _____ State ____ Zip _____
 Phone: Hm _____
 Bus _____ Fax _____
 Type of Vehicle _____
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 Childrens Birthday _____
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 Other Vehicles in Household _____
 Other Vehicles in Household _____

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 Type of Vehicle _____
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 Childrens Birthday _____
 Childrens Birthday _____
 Childrens Birthday _____
 Anniversary _____
 Other Vehicles in Household _____
 Other Vehicles in Household _____

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Customer Log

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Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
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Other Vehicles in Household _____
Other Vehicles in Household _____

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Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
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Customer Log

Name _____
Spouse _____
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City _____ State ____ Zip _____
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Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
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Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
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Type of Vehicle _____
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Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
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Other Vehicles in Household _____

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Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
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Other Vehicles in Household _____

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Anniversary _____
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Customer Log

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 Bus _____ Fax _____
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Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
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Childrens Birthday _____
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Childrens Birthday _____
Childrens Birthday _____
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Other Vehicles in Household _____

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Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

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Childrens Birthday _____
Childrens Birthday _____
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Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
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Other Vehicles in Household _____

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Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

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Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

WEEKLY STATISTICS

DATE	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	TOTALS
UPS								
TOTAL SALES								
DELIVERIES								
COMMISSIONS								
REFERRAL SALES								
REPEAT CUSTOMER SALES								
PHONE-UPS								
PHONE-UP SALES								
PROSPECT CALLS								
PROSPECT CALL SALES								
MAILOUTS								
MAILOUT SALES								
FOLLOW-UP CALLS								

WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
GROSS PROFIT TOTAL								
GROSS PROFIT AVERAGE								
NEW CARS								
NEW TRUCKS								
USED VEHICLES								
LEASED VEHICLES								
SERVICE CONTRACTS								
LIFE ACCIDENT HEALTH								
RUST PAINT FABRIC								
AFTERMARKET SALES								
FINANCE CONTRACTS APPROVED								
FINANCE CONTRACTS DECLINED								
CASH DEALS								

WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
UPS								
TOTAL SALES								
DELIVERIES								
COMMISSIONS								
REFERRAL SALES								
REPEAT CUSTOMER SALES								
PHONE-UPS								
PHONE-UP SALES								
PROSPECT CALLS								
PROSPECT CALL SALES								
MAILOUTS								
MAILOUT SALES								
FOLLOW-UP CALLS								

WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
GROSS PROFIT TOTAL								
GROSS PROFIT AVERAGE								
NEW CARS								
NEW TRUCKS								
USED VEHICLES								
LEASED VEHICLES								
SERVICE CONTRACTS								
LIFE ACCIDENT HEALTH								
RUST PAINT FABRIC								
AFTERMARKET SALES								
FINANCE CONTRACTS APPROVED								
FINANCE CONTRACTS DECLINED								
CASH DEALS								

WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
UPS								
TOTAL SALES								
DELIVERIES								
COMMISSIONS								
REFERRAL SALES								
REPEAT CUSTOMER SALES								
PHONE-UPS								
PHONE-UP SALES								
PROSPECT CALLS								
PROSPECT CALL SALES								
MAILOUTS								
MAILOUT SALES								
FOLLOW-UP CALLS								

WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
GROSS PROFIT TOTAL								
GROSS PROFIT AVERAGE								
NEW CARS								
NEW TRUCKS								
USED VEHICLES								
LEASED VEHICLES								
SERVICE CONTRACTS								
LIFE ACCIDENT HEALTH								
RUST PAINT FABRIC								
AFTERMARKET SALES								
FINANCE CONTRACTS APPROVED								
FINANCE CONTRACTS DECLINED								
CASH DEALS								

WEEK OF _____

WEEKLY STATISTICS

DATE													
UPS													
TOTAL SALES													
DELIVERIES													
COMMISSIONS													
REFERRAL SALES													
REPEAT CUSTOMER SALES													
PHONE-UPS													
PHONE-UP SALES													
PROSPECT CALLS													
PROSPECT CALL SALES													
MAILOUTS													
MAILOUT SALES													
FOLLOW-UP CALLS													

Monday													
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Tuesday													
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Wednesday													
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Thursday													
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Friday													
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Saturday													
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Sunday													
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Totals													
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WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
GROSS PROFIT TOTAL								
GROSS PROFIT AVERAGE								
NEW CARS								
NEW TRUCKS								
USED VEHICLES								
LEASED VEHICLES								
SERVICE CONTRACTS								
LIFE ACCIDENT HEALTH								
RUST PAINT FABRIC								
AFTERMARKET SALES								
FINANCE CONTRACTS APPROVED								
FINANCE CONTRACTS DECLINED								
CASH DEALS								

WEEK OF _____

WEEKLY STATISTICAL SUMMARY

DATE	Week 1	Week 2	Week 3	Week 4	Week 5	Totals
UPS						
TOTAL SALES						
DELIVERIES						
COMMISSIONS						
REFERRAL SALES						
REPEAT CUSTOMER SALES						
PHONE-UPS						
PHONE-UP SALES						
PROSPECT CALLS						
PROSPECT CALL SALES						
MAILOUTS						
MAILOUT SALES						
FOLLOW-UP CALLS						

WEEKLY STATISTICAL SUMMARY

DATE	Week 1	Week 2	Week 3	Week 4	Week 5	Totals
GROSS PROFIT TOTAL						
GROSS PROFIT AVERAGE						
NEW CARS						
NEW TRUCKS						
USED VEHICLES						
LEASED VEHICLES						
SERVICE CONTRACTS						
LIFE ACCIDENT HEALTH						
RUST PAINT FABRIC						
AFTERMARKET SALES						
FINANCE CONTRACTS APPROVED						
FINANCE CONTRACTS DECLINED						
CASH DEALS						

MONTHLY STATISTICAL SUMMARY

	Current Month	Running Totals
UPS		
TOTAL SALES		
DELIVERIES		
COMMISSIONS		
REFERRAL SALES		
REPEAT CUSTOMER SALES		
PHONE-UPS		
PHONE-UP SALES		
PROSPECT CALLS		
PROSPECT CALL SALES		
MAILOUTS		
MAILOUT SALES		
FOLLOW-UP CALLS		

CLOSING RATIOS:

% of Deliveries	% of Sales	
Deliveries ÷ Sales = _____	Sales ÷ Ups = _____	
% of Total Deliveries	% of Total Sales	
Deliveries ÷ Sales = _____	Sales ÷ Ups = _____	

PLOT YOUR TOTAL DELIVERIES EACH MONTH

38					
37					
36					
35					
34					
33					
32					
31					
30					
29					
28					
27					
26					
25					
24					
23					
22					
21					
20					
19					
18					
17					
16					
15					
14					
13					
12					
11					
10					
9					
8					
7					
6					
5					
4					
3					
2					
1					

J F M A M J J A S O N D

MONTHLY STATISTICAL SUMMARY

GROSS PROFIT TOTAL	
GROSS PROFIT AVERAGE	
NEW CARS	
NEW TRUCKS	
USED VEHICLES	
LEASED VEHICLES	
SERVICE CONTRACTS	
LIFE ACCIDENT HEALTH	
RUST PAINT FABRIC	
AFTERMARKET SALES	
FINANCE CONTRACTS APPROVED	
FINANCE CONTRACTS DECLINED	
CASH DEALS	

Current Month	

Running Totals	

COMMISSION & GROSS AVERAGES:

Monthly Commission Average Monthly Gross Average
 Commission ÷ Del = _____ Gross ÷ Del = _____
 Total Commission Average Total Gross Average
 Commission ÷ Del = _____ Gross ÷ Del = _____

