



Client Care Manager Responsibilities - Daily Checklist

Email this form daily to: accountability@ingraminteractive.com; Dealership Management

Performance Metrics for Date: ____ / ____ / ____

Team Member Engagement

- Shared individual daily metrics with each CCR
- Current totals for the team are posted on the Score Board and updated throughout the day
- Conducted daily huddle Time: _____ Topic: _____
- Review KPI reports and ensure there are no overdue tasks

ANALYZE THE KPIS – PRIOR DAY’S NUMBERS						
Inbound Calls	Appts Set	Appt Set (65%)	Appt Show	Appt Show (65%)	Sold	Sold (33%)
Internet Leads	Appts Set	Appt Set (45%)	Appt Show	Appt Show (65%)	Sold	Sold (50%)
UST Calls	Contacted 40%	Appt Set	Appt Set (20%)	# of Reps worked	Avg. OB calls/Rep	% confirmed

Coaching and Counseling

- Logged into Who’s Calling daily
- Review 3 random calls per CCR and provided immediate coaching
- Review 2 prior day’s emails (non-templates) for each CCR and provided immediate coaching
- Ensure that outbound dials are on target of 150 dials per day
- Conducted coaching sessions for: _____

Check all types of coaching sessions that were conducted:

- Call Grading Training Notes
- Call/Email process compliance calibration
- Side-by-side Call Observation
- Other: _____

Lead Management

- Checked and responded to all voicemails and overnight leads upon CCC opening
- Reviewed Sales Tracking report throughout the day to properly follow up with all leads
- Reviewed and reassigned outbound tasks based on staffing needs
- Reviewed all LOST prospects to ensure they are truly lost
- CCRs have completed all due/overdue tasks
- Followed Up with No Show or soft appointment clients

Administrative

- Researched, resolved, and reported No Shows / inaccuracies in CRM
- Reconciled all shows and solds with records from desk, fixed inaccuracies, and merged records as necessary
- Monitored schedule adherence violations and counseled repeat offenders
- Monitored and adjusted schedules based on staffing needs

CCM Signature: _____ Date: _____ ©