

Hannah Daily Planner *Inside Pages*

NAME _____

DAILY PLANNER INSTRUCTIONS

The purpose of the DAILY PLANNER is to aid a professional salesperson in planning his/her daily work. If instructions are followed each day, the next days work will be planned. The DAILY PLANNER is designed for a year of work planning. You can begin on any day in any month and continue for one year. It must be dated for a minimum of thirty (30) working days in advance. This will assure that no dates are overlooked and no prospects lost.

UNITS WANTED – List that special car the customer is trying to find.

EXPENSES – Keep track of various expenses incurred each month.

MONTHLY SUMMARY – Entries are made as each unit is sold. This provides a quick review of number of units sold, source of buyer, amount of gross profit per sale, and commission per sale.

GOALS FOR THE MONTH – A simple day-by-day method to keep track of sales progress . . . Goals should be set before the first day of each month.

DAILY PLANNER
Must Do Today! There is some work that the salesperson must do by self-discipline. Make a list of the most important things and begin each day by doing them.

Appointments For Today. All appointments must be made for a specific hour of the day. If the appointment is not kept, then the prospect must be contacted as soon as possible to find why the appointment was broken, and to make a new appointment.

Prospects Worked in Person Today! Keep a complete list of all prospects worked. If the prospect did not buy, give the reason or excuse why. Make follow-up appointments if possible. Make the prospect follow-up a "Must Do" for tomorrow.

Outside Contacts. Make plans to see prospective buyers, old owners, or referrals outside the dealership. These can be very productive and should be followed regularly.

Permanent Owner Follow-up File. The best source for prospects is from a new, happy owner. Know all you can about your owners. When you call the owner to ask for another sale at a later date (or for a referral) you will have knowledge of where he works, lives, what car he owns, how much he financed, and much more. Fill these spaces with all the information you can about the new owner. It will amaze and delightfully surprise a customer that you cared enough to remember so much!

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GOALS FOR THIS MONTH

1. NUMBER OF SALES PROJECTED _____

2. AMOUNT OF EARNINGS PROJECTED \$ _____

DATE	DAY	PROJECTED SALES (CUMULATIVE)	ACTUAL SALES (CUMULATIVE)	PROJECTED EARNINGS (CUMULATIVE)	ACTUAL EARNINGS (CUMULATIVE)
1				\$	\$
2				\$	\$
3				\$	\$
4				\$	\$
5				\$	\$
6				\$	\$
7				\$	\$
8				\$	\$
9				\$	\$
10				\$	\$
11				\$	\$
12				\$	\$
13				\$	\$
14				\$	\$
15				\$	\$
16				\$	\$
17				\$	\$
18				\$	\$
19				\$	\$
20				\$	\$
21				\$	\$
22				\$	\$
23				\$	\$
24				\$	\$
25				\$	\$
26				\$	\$
27				\$	\$
28				\$	\$
29				\$	\$
30				\$	\$
31				\$	\$
TOTALS				\$	\$

DAY _____
DATE _____

DAILY PLANNER

No.	MUST DO TODAY: MAIL OUTS # _____	COLD CALLS # _____	OLD OWNERS # _____
1.			
2.			
3.			
4.			

APPOINTMENTS FOR TODAY MAKE APPOINTMENTS BY DAY AND HOUR

No.	NAME AND PHONE NO.	TIME	REASON FOR APPOINTMENT
1.			
2.			
3.			

PROSPECTS WORKED IN PERSON TODAY

No.	NAME	SOLD	REASON FOR NO SALE	RECONTACT (DATE)
1.				
2.				
3.				
4.				
5.				

OUTSIDE CONTACTS: REFERRALS, OLD OWNERS, NEW PROSPECTS

No.	NAME	PHONE NO.	RESULTS
1.			
2.			
3.			

PERMANENT OWNER FOLLOW-UP FILE

	INFORMATION ABOUT CUSTOMERS FOR FUTURE FOLLOW-UP TYPE VEHICLE BOUGHT, FINANCE INFORMATION, WHERE EMPLOYED, TYPE TRADE-IN, ETC.
NAME	
PHONE NOS.	
COMMISSIONS	
NAME	
PHONE NOS.	
COMMISSION \$	

PLAN YOUR WORK - WORK YOUR PLAN

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Manager's Tower Log *Inside Pages*

Manager's Tower Log												Today's Date: _____ Manager: _____	
Customer	Phone #	Lead Source	Stock #	N/U	Vehicle	Trade-In	ACV	Salesperson	Demo	Write Up	C-F-I	G.P.	Results
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
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