

BDC Daily Routine

In the a.m. you should *ALWAYS* hold a Daily Review with Sales Managers.
In this quick 15 to 20 minute meeting you will briefly discuss:

- 1) VIP Appointments that did not show for yesterday, discuss a game plan for each customer with the Sales Manager.
Call each one to reschedule.
- 2) VIP Appointments for today, discuss a game plan for each customer, if necessary, with the Sales Manager.
Confirm any VIP Appointments for the day that have not been confirmed and mark them on the electronic desk log to show that they are confirmed.
- 3) Print and Review the Scheduled and Completed Tasks Report with the Sales Managers.

Throughout the day:

- 1) Daily Organizer tasks - Complete all of your follow up and assigned tasks.
Then Review each Salesperson's Monthly View Organizer.
- 2) Confirm any VIP Appointments made throughout the day as they occur.
- 3) Complete each task. This includes comments for what occurred and direction for future follow up (RTCB – Reason To Call Back), the sales steps that were achieved and marking the prospect with the correct Sales Status,
- 4) When making Outbound Calls, use the '**Click to Call**' feature in the CRM.
- 5) You are responsible for completing 80 Outbound calls per day.
- 6) Most importantly, there must be notes in the CRM on tasks completed, especially Outbound Calls in each Customer Record to substantiate any bonus.

At the end of the day:

Send in your Daily Calls and Appointment Totals to your GM.

Reports to Use:

- 1) **Appointment Log** – shows appointments by date, who confirmed, if shown, not, or still open
- 2) **BDC Report** – Shows Internet and Phone ups by each individual BDC Agent's Appointments Set, Shown and Sold
- 3) **Daily BDC Agent Summary** – shows each individual BDC Agent's New and Used Internet and Phone ups Appointments Set, Shown and Sold.
- 4) **Outbound calling activity**– shows each individual Salesperson and BDC Agent's Call Activity.

BDC Agent _____ date _____

Printed name _____

BDC Manager _____ date _____

Printed name _____