

THE DEALER CRM LEAK AUDIT

Find where internet demand disappears between assignment, contact, appointment, show, and sold.

THE LEAK

The Dealer CRM Leak Audit

A CRM can show thousands of activities and still hide a broken process. Completed tasks are not the same as completed conversations. The audit starts with stages and evidence, not dashboard color.

What good looks like

- Every lead has one accountable owner.
- First-response time is visible at the lead level.
- The first response answers the customer's question.
- Call, text, and email attempts are recorded accurately.
- Appointment status reflects what happened, not what helps the report.
- Lost reasons are specific and reviewed.
- Duplicate, bad, and unreachable leads are separated.
- Managers inspect examples from every stage each day.

USE THIS LANGUAGE

Manager question: "Show me the last five leads that moved from new to contacted. Where is the customer's reply?"

Manager question: "Which stage has the biggest count and the oldest average age?"

Manager question: "What behavior would move ten percent of this stage forward this week?"

Language is a tool, not a costume

Do not memorize these words until they sound dead. Understand the job each line performs. Keep the intent, use your natural voice, and listen to the answer. A script that prevents listening is not a script. It is a hiding place.

FIELD INSPECTION

OK	STANDARD	OWNER
☐	Every lead has one accountable owner.	_____
☐	First-response time is visible at the lead level.	_____
☐	The first response answers the customer's question.	_____
☐	Call, text, and email attempts are recorded accurately.	_____
☐	Appointment status reflects what happened, not what helps the report.	_____
☐	Lost reasons are specific and reviewed.	_____
☐	Duplicate, bad, and unreachable leads are separated.	_____
☐	Managers inspect examples from every stage each day.	_____

Write the three examples you will inspect

1. _____
2. _____
3. _____

THE SCOREBOARD

- Median first response
- Contact rate
- Appointment set rate
- Show rate
- Sold rate
- Stage age
- Lost reason quality

The numbers do not coach the team by themselves. They tell the manager where to inspect. Pull the work behind the number, identify the repeatable behavior, and coach that behavior while the example is still fresh.

Your twenty-four-hour move

Choose one source and trace twenty leads from arrival to final disposition. Do not accept summary totals.

FOUND ONE LEAK

Now find the rest of them

This guide isolates one breakdown. Your CRM, calls, lead handling, handoffs, and manager behavior operate as one system. Fixing the loudest symptom while the next leak stays hidden is how dealerships stay busy without getting better.

Request a free CRM audit at ingraminteractive.com/request-a-diagnostic. We will look at the real workflow, identify where sold units are escaping, and tell you what deserves action first.

Ingram Interactive installs dealership process for internet leads, inbound phone opportunities, floor traffic, manager turn-overs, follow-up discipline, and staff accountability.