



**THE POWER OF A CALL
MONITORING SOLUTION**
Stan Sher – Dealer eTraining

WHO IS STAN SHER?



- 10 years automotive industry experience
- Held positions in Sales, Sales Management, eCommerce and BDC Director
- Dealer Association Speaker GNYADA/NJCar
- Writer for numerous industry publications



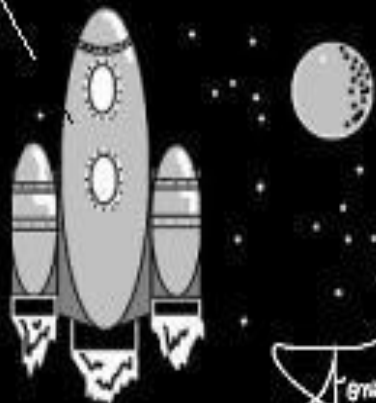
AGENDA

- What is Call Monitoring
- Why is Call Monitoring Important
- What to Monitor
- CRM Integration
- What to Track
- How to Monitor and Manage



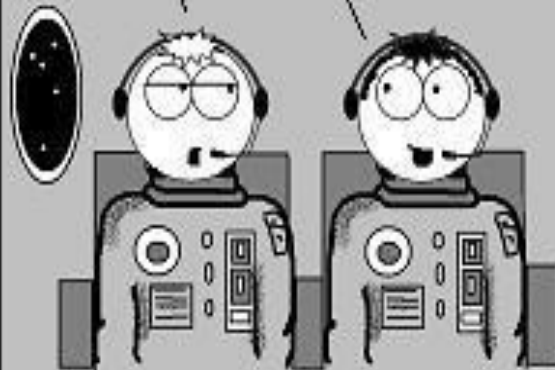
WHAT IS CALL MONITORING?

I LIKE BEING AN
ASTRONAUT, BUT IT
BOTHERS ME THAT
EVEN MY VITAL SIGNS
ARE BEING MONITORED.

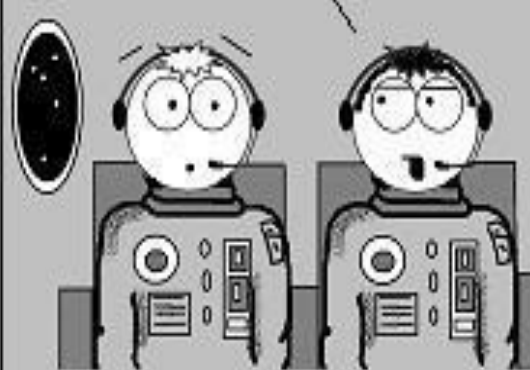


DOESN'T THAT
BOTHER YOU?

NOT REALLY



I SPENT A FEW YEARS
AS A CALL CENTER
REP, SO I'M USED TO
IT.



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WHAT IS CALL MONITORING?

Reports | Missed Opportunity Report

Specify Report Criteria

Select Report Type: Only Missed Opportunities All Reviewed Missed Opportunities

Select a Date Range: Custom to

Campaign Group: Campaign:

Sales					
Total Reviewed: 4				Total Missed Opportunities: 1	
Date and Time	Agent	TFN	Caller	Caller ID	Recording
02/01/2011 at 6:39 AM	Joe Agent	(800) 555-2302	Any Caller	(965) 555-1694	Listen
Rude salesperson		Comments:			

Service					
Total Reviewed: 4				Total Missed Opportunities: 1	
Date and Time	Agent	TFN	Caller	Caller ID	Recording
02/01/2011 at 6:03 AM	Any Agent	(800) 555-2555	Any Caller	(965) 555-1555	Listen
Misunderstood request		Comments:			

Unknown					
Total Reviewed: 4				Total Missed Opportunities: 1	
Date and Time	Agent	TFN	Caller	Caller ID	Recording
02/01/2011 at 5:59 AM	Not Available	(800) 555-2323	Any Caller	(965) 555-9494	Listen
Misunderstood request		Comments:			



WHY CALL MONITORING IS IMPORTANT

- Training Purpose
 - Quality Assurance
 - Security
 - Success Tracking
- * The Phone is the most misused opportunity in the dealership!



Department Review-Sales

Phone Handling	Total	Percentage	Best of the Best %
Total Calls	96416		
On Hold Hang-Up / Terminated Call	6140	6%	2%
Reached Voice Mail - Left Message	6561	7%	5%
Reached Voice Mail - No Message	5911	6%	1%
Call Answered - Agent Not Available	8498	9%	5%
Total Intended Agent Not Reached / Incomplete Call	27110	28%	10%

Phone Skills	Total	Percentage	Best of the Best %
Agent Identified	65119	94%	90%
Agent Not Identified	4150	6%	10%

Customer Information Obtained	38021	51%	75%
Customer Information Not Obtained	36121	49%	25%

Agent Set Appointment	22386	23%	40%
Same Day Appointment Set	12471	56%	50%

Follow-up Practices	Total	Percentage	Best of the Best %
Call Off-Lined for Return Call	19775	29%	15%
Broken Promise - Cust. Calls Back	437	2%	0%

Department Review-New/Lease

Phone Handling	Total	Percentage	Best of the Best %
Total Calls	4847		
On Hold Hang-Up / Terminated Call	260	5%	2%
Reached Voice Mail - Left Message	31	1%	5%
Reached Voice Mail - No Message	54	1%	1%
Call Answered - Agent Not Available	523	11%	5%
Total Intended Agent Not Reached / Incomplete Call	868	18%	10%

Phone Skills	Total	Percentage	Best of the Best %
Agent Identified	3926	99%	90%
Agent Not Identified	43	1%	10%

Customer Information Obtained	2834	67%	75%
Customer Information Not Obtained	1375	33%	25%

Agent Set Appointment	2526	52%	40%
Same Day Appointment Set	951	38%	50%

Follow-up Practices	Total	Percentage	Best of the Best %
Call Off-Lined for Return Call	344	9%	15%
Broken Promise- Cust. Calls Back	22	6%	0%

ROI Detail



Campaigns Generate a report from All Campaign Groups and the following campaign(s): 49 Campaigns Selected	Date Range From: 07/16/2009 To: 08/16/2009	Calls For: Non-Unique Calls of Any Length	ROI Settings ROI Period: 90 Days Estimated Profit: \$	Display Options <input checked="" type="checkbox"/> Exclude campaigns without revenue
Print Friendly		Export Report To: Excel - Formatted		Export

ROI Detail

Campaign	Number	Total Calls	Calls with Revenue	Sales Deals	Campaign Cost	Revenue	Estimated Profit	Estimated ROI %
Capital One	888-662-0000	31	8	3	\$758.99	\$104,967.24	\$4,298.03	619.79%
Premium Mailer	888-800-5938	238	9	7	\$5,800.00	\$128,290.00	\$7,897.40	132.71%
AAA	888-662-0000	75	1	1	\$1,258.00	\$27,476.43	\$1,348.58	107.20%
Autotrader	888-900-6374	44	15	2	\$1,300.00	\$46,531.36	\$2,455.88	223.26%
NC Friday	888-660-0000	199	17	10	\$2,250.00	\$242,782.48	\$14,566.95	647.42%
Cash for Clunkers	888-800-5823	98	15	5	\$1,658.00	\$31,975.30	\$7,918.52	477.59%
cars.com	888-661-0000	91	3	2	\$1,050.44	\$42,967.41	\$2,579.04	245.42%
Friday Full Page Used	888-800-5346	8	2	1	\$4,200.00	\$19,626.38	\$1,177.50	28.72%
Newsday Sunday	888-663-0000	84	11	7	\$2,650.00	\$148,311.21	\$8,899.67	335.80%
Service ADVANTAGE	888-800-3826	403	3	2	\$1,258.00	\$39,588.52	\$2,575.31	188.60%
Newsday	888-210-0000	307	10	7	\$2,564.50	\$145,186.42	\$8,711.19	339.68%
Total		1378	94	44	\$24,448.81	\$1,822,264.74	\$61,335.88	258.87%

WHAT TO MONITOR

- ❑ All Digital Marketing
- ❑ Traditional Marketing
- ❑ Social Media
- ❑ Website (sales/service)
- ❑ Pay Per Clicks
- ❑ Email Templates
- ❑ Third Party Lead Sources
- ❑ Inventory Listings
- ❑ Reputation Sites
- ❑ OEM Sites





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CRM INTEGRATION

- Find a solution to track outbound and inbound phone calls
- Get a copy of outgoing phone list in CRM

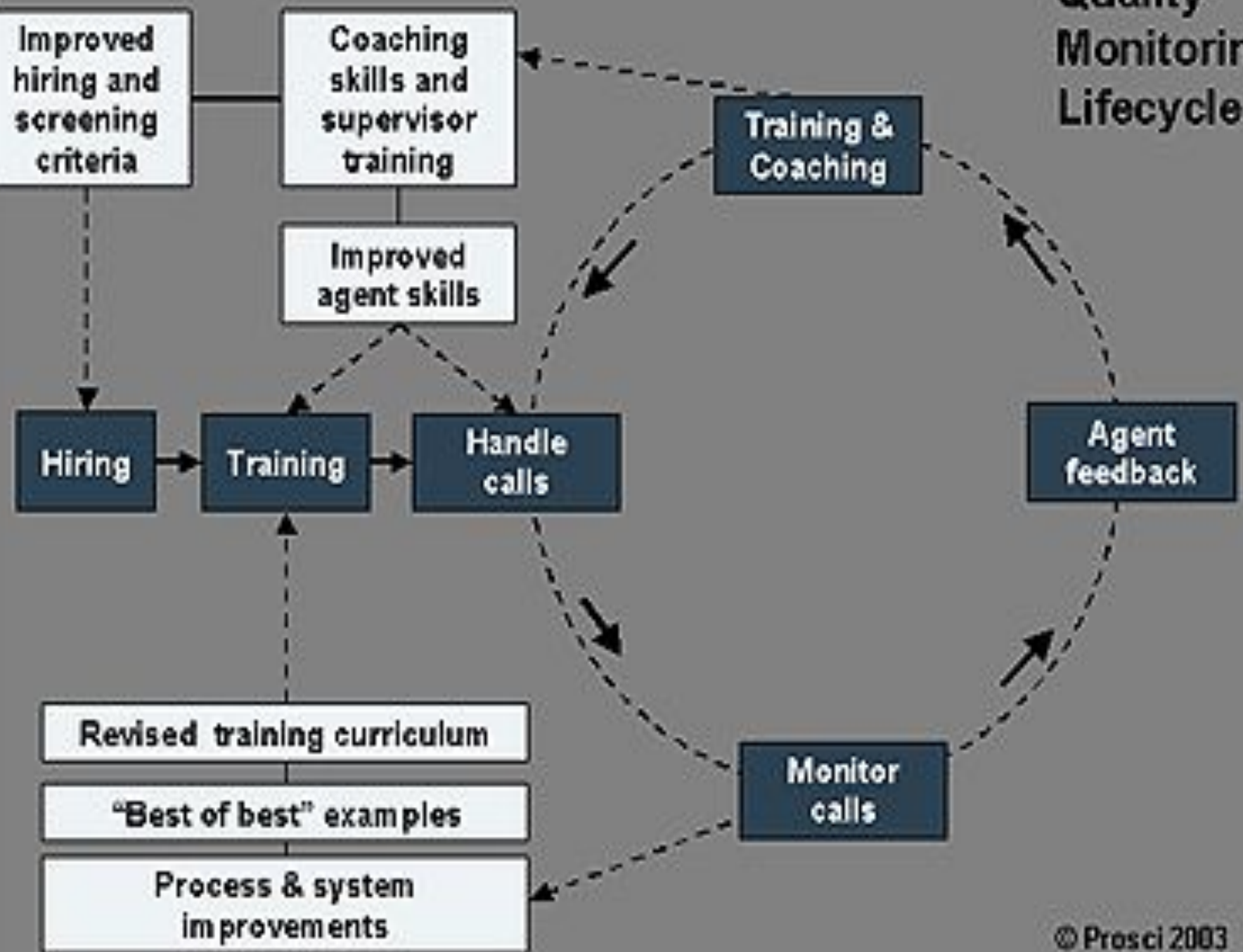


HOW TO MONITOR AND MANAGE

- Create a daily routine
- Review random calls (10 per day)
- Train your team weekly (3x)
- Training 30 minutes per session
- Be prepared to TO phone calls live
- Use TO as training opportunity
- Create Accountability Report



Quality Monitoring Lifecycle



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