



UNITS[®] Web | Lead Management

The engagement, focus & results your team needs.

Auto-IT is excited to announce a revolution in lead/prospect management for retail automotive dealers. It's called UNITS® Web | Lead Management, and it will transform your sales department.

Easier, faster and smarter.

It begins with a responsive browser-based interface that is logical and intuitive, delivering a satisfying experience for novice and experienced users alike.

It allows each member of the sales department to focus on what matters, to overcome roadblocks to each sale, and close more deals.

Developed, owned and managed in Australia by Auto-IT, UNITS® Web | Lead Management:

- Ensures sales processes are no longer discretionary, but take centre stage
- Is integrated live with UNITS® in one database
- Works on desktop and tablet devices
- Works anywhere Internet is available
- Is operating system and platform independent
- Gives salespeople a structured approach to lead cultivation, prospect journeys and customer outreach post-sale.
- Gives sales managers a clean overview of departmental and individual salesperson performance, with easy drill-down.

Each new entry begins with a dynamic search, ensuring duplicates are minimised, while its Google API ensures data accuracy and formatting consistency.

Every lead is captured quickly and easily, and then assigned to the relevant staff member. This allows greater oversight by managers and accountability for prospect nurturing. It also ensures no lead falls through the cracks. All enquiries for the day are visible on the same screen and updated live.

It enhances oversight and issue mitigation while minimising leakage and data entry errors. CSI levels improve, decisions are easier to make and problems are spotted almost as soon as they arise.

The system's strength is its structured delivery of non-discretionary prospecting tasks. Everything is tracked for process auditing and performance coaching.

A graphical representation of lead progress in Road to Sale gives sales managers the clarity they need, while the Sales Dashboard provides access to each salesperson's calendar, enquiries, tasks and diary notes.

Lead, prospect and client searches are live, dynamic and fast, making searches an effortless exercise.

Managers have a clear, unambiguous view of all sales activity through four pillars, and the data is sortable via column headers and cascading filters. This delivers a clean, high-level view of departmental effectiveness, with the added power of drill-down.

Deliveries

- Detailed overview of vehicle delivery status
- Better management of the delivery touch points
- Higher CSI levels

Road to Sale

- Each step tracked/coloured (based on execution)
- Tasks tracked based on current status
- Visual cues drive engagement and sales
- Highlights blockages, prompting assistance

Delivery Follow-Up

- Prompts post-delivery client engagement
- Fosters better relationships with customers
- Drives add-on and referral business

Service Vehicles

- Connect with clients when in the service dept.
- Strengthen relationship over the long term
- Seek referral business

UNITS® Web | Auto-It Demo | Chaston2, Ruben2

HOME | SHOWROOM | SALES DASHBOARD | SALES CENTRE | ROAD TO SALE | STOCK LOCATOR | CONTACT | SYSTEM

Sales Centre

15 | 15 | 46

DELIVERIES 15

ROAD TO SALE

Task Due Date | Pending | 207 | 17 | 186 | 0 | 4 | Add Opportunity

Days	Opportunity With	Salesperson	Type	FR	Make	Model	Activities	TD	Q	O	S
9	Cremin Motor Repairs Pty Ltd	Gray2, Mr Lydon	NEW	BM	BMW	535i	FR TI AP TD IM IF IA IS - -	30	2	0	A
10	Hudson, Ms Carole	Tull, Mr Jethro	NEW	BM	BMW	530i	FR TI AP TD IM IF IA IS - -	64	2	1	A
32	Bartoletti, Ms Telly	Audreanne Pty Ltd.	DEMO	BM	BMW	525i	FR TI AP TD IM IF IA IS - -	11	4	2	A

Show 10 entries

DELIVERY FOLLOW-UP 15

SERVICE VEHICLES 46

Windows Taskbar: 5:03 PM 13/09/2017

Salesperson

Enter salesperson

Daily Agenda | Enquiries | Tasks | Diary Notes

Date/Time	#	Name	Note/Comment	Salesperson	Completed
07/09/2017 10:42	27198	Man with red had	Please return call - before midday	Sugathadasa, Mr Ja...	No
05/09/2017 14:40	27196	David Brown	Please return call - Before 3:00 pm	Gray2, Mr Lydon	No
04/09/2017 11:11	27195	David Robertson	David Robertson-Please return call - Before 12:30	Tull, Mr Jethro	No
04/09/2017 10:44	27194	David Brownlee	David Brownlee-Please return call	Sugathadasa, Mr Ja...	No
04/09/2017 10:37	27193	Julie	Julie	Sugathadasa, Mr Ja...	No
04/09/2017 10:36	27192	David	Please return call	Tull, Mr Jethro	No
04/09/2017 10:36	27191	Bill	Please return call	Tull, Mr Jethro	No
04/04/2017 08:53	26967	Smith, Edward	Smith, Edward-Please return call - unhappy with service	Gray2, Mr Lydon	No
16/03/2017 11:00	26872	Man with red hat	Man with red hat	Sugathadasa, Mr Ja...	No
14/03/2017 14:53	26869	Man in Yard - Blue ...	Man in Yard - Blue hat	Sugathadasa, Mr Ja...	No

Show 10 entries

27 Active Enquiries
68 Outstanding Opportunity Tasks
81 Outstanding Contact Tasks
3 Outstanding Diary Notes

September 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	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
1	2	3	4	5	6	7

HOME | SHOWROOM | APPRAISALS | CONTACT | CONTACT MAINTENANCE | ENQUIRY MANAGEMENT | DIRECT CONNECT | WORKSHOP

Direct Connect

Email | SMS

To

Subject

Start typing your email message

Rich Text Editor: Arial, 24, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Decrease Indent, Undo, Redo, Link, Unlink, Image, Video, Print, Help



Transform your sales team with a fully-integrated mobile solution that invites engagement and rewards you with:

- More deals
- Happier team members
- Stronger CSI scores
- Better resource usage
- Faster issue mitigation
- Better decision making
- Less micro-managing

UNITS® Web | Lead Management is the first in a series of new solutions from the team at Auto-IT, Australia's most respected DMS company.

Learn more about **UNITS® Web | Lead Management**

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POWERFUL DEALER MANAGEMENT SYSTEMS

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