



Salesperson's Organizational Planbook

A Complete System
for Organizing
Your Day



Salesperson,**inc**

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INSTRUCTIONS

Welcome to the expanded edition of the **Salesperson's Organizational Planbook**. For those familiar with the original edition, please note that all categories remain the same, however, some have been expanded and relocated to the back of the book. In addition, a statistics section has been added to help you plot the growth of your business.

Today's Goals

Each morning, write down the number of Ups, Sales, Deliveries, Follow-Up Calls, Prospect Calls, and Mailouts you intend on making that day.

Today's Totals

At the end of each day, record the actual results of your efforts.

Things To Do List

List all of the tasks you need to accomplish for that day. Remember to transfer all unfinished business from previous days. Once each task is completed, note its completion by striking through with a yellow highlight marker. This allows you to view the tasks you've completed.

Phone-Ups

Record all of the Phone-Ups and nature of call you receive that day. Review this list often and follow-up for the purpose of setting appointments and making sales.

Follow-Ups

List all of the Follow-Up Calls you need to make that day, and purpose for calling. Then make a notation if your call was successful, and when you need to follow-up again.

Appointment

Record all appointments you've scheduled along with a phone number in order to confirm the appointment.

Ups

Record the names and purpose of visit of all new prospects that visited the dealership.

Want List

List all vehicles requested by customers that are not part of your current inventory and review this list often. In addition to doing a locator search, make a practice of taking this list with you when you take your daily inventory walk.

Prospect Calls

A steady number of prospect calls should be made daily in order to increase your client base. Although prospecting is never easy, the more calls you make, the easier it becomes. Develop a script to help make your calling easier and more accepting to the prospect.

Mailouts

Mailouts are a great source for introducing yourself and keeping your name alive with future prospects and current customers. Make sure you record each Mailout including routine paperwork.

Customer Log

In addition to recording the sale, make certain you've recorded all other pertinent information about the customer before he/she takes delivery. This will allow you to develop future business, and give you more information for following-up.

INSTRUCTIONS

Statistics

The Statistics section of the planbook will help you predict how to increase your sales and profits. By mathematically tracking each month, you can determine where improvement or enhancement needs to take place. Follow this step-by step process:

1. Fill in the dates at the top of the Weekly Statistics sheet.
 2. Record each day's activities and source of business.
 3. At the end of each week, total all of the categories.
 4. Transfer the weekly totals to the corresponding week on the Weekly Statistical Summary sheet.
 5. At the end of the month, total the categories.
 6. Transfer the totals to the Monthly Statistical Summary sheet.
 7. Calculate the Closing Ratios, Total Commissions, and Gross Averages.
 8. Plot Total Monthly Deliveries and Commissions on the respective graphs, bringing forward Totals from the previous months.
- If you want to increase your sales, it may be as easy as increasing your numbers.
 - Watch for discrepancies in each month regarding your sales and profits. If you notice your sales dropping, look to see where your statistics may be fluctuating and adjust them accordingly.

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

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Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
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Type of Vehicle _____
Trade-In _____

Name _____
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Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
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Date _____

Appointments

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Ups

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Type of Vehicle _____
Trade-In _____

Name _____
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Name _____
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Type of Vehicle _____
Trade-In _____

Name _____
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Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
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Date _____

Appointments

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Ups

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Type of Vehicle _____
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Name _____
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Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

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Date _____

Appointments

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Ups

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
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City _____ State ____ Zip _____
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Type of Vehicle _____
Trade-In _____

Name _____
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Type of Vehicle _____
Trade-In _____

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
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Date _____

Appointments

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Ups

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
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City _____ State ____ Zip _____
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Type of Vehicle _____
Trade-In _____

Name _____
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Type of Vehicle _____
Trade-In _____

Name _____
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Type of Vehicle _____
Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

1. _____	13. _____
2. _____	14. _____
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Date _____

Appointments

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Ups

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
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Type of Vehicle _____
Trade-In _____

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
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Trade-In _____

Date _____

Today's Goals

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Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
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Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

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Date _____

Appointments

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Ups

Name _____
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City _____ State ____ Zip _____
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 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
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City _____ State ____ Zip _____
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Name _____
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Date _____

Today's Goals

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Sales _____
Deliveries _____
Follow-Up Calls _____
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Mailouts _____

Today's Totals

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Sales _____
Deliveries _____
Follow-Up Calls _____
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Things To Do List

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Ups

Name _____
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City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
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Type of Vehicle _____
Trade-In _____

Name _____
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Name _____
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Date _____

Today's Goals

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Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
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Mailouts _____

Today's Totals

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Sales _____
Deliveries _____
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Things To Do List

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Type of Vehicle _____
Trade-In _____

Name _____
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City _____ State ____ Zip _____
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Today's Goals

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Sales _____
Deliveries _____
Follow-Up Calls _____
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Mailouts _____

Today's Totals

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Sales _____
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Follow-Up Calls _____
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Things To Do List

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2. _____	14. _____
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Date _____

Today's Goals

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Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
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Today's Totals

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Sales _____
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Things To Do List

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City _____ State ____ Zip _____
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Type of Vehicle _____
Trade-In _____

Name _____
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Trade-In _____

Date _____

Today's Goals

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Sales _____
Deliveries _____
Follow-Up Calls _____
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Mailouts _____

Today's Totals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
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Things To Do List

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Ups

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City _____ State ____ Zip _____
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Type of Vehicle _____
Trade-In _____

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Name _____
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Trade-In _____

Date _____

Today's Goals

Ups _____
Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
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Mailouts _____

Today's Totals

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Sales _____
Deliveries _____
Follow-Up Calls _____
Phone-Ups _____
Prospect Calls _____
Mailouts _____

Things To Do List

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Ups

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Name _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____

Customer Log

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

Customer Log

Name _____
Spouse _____
Address _____
City _____ State ____ Zip _____
Phone: Hm _____
 Bus _____ Fax _____
Type of Vehicle _____
Trade-In _____
Date Delivered _____ Stock # _____
Gross Profit _____ Commission _____
Husbands Birthday _____
Wifes Birthday _____
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Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

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Phone: Hm _____
 Bus _____ Fax _____
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Husbands Birthday _____
Wifes Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Childrens Birthday _____
Anniversary _____
Other Vehicles in Household _____
Other Vehicles in Household _____

WEEKLY STATISTICS

DATE	UPS	TOTAL SALES	DELIVERIES	COMMISSIONS	REFERRAL SALES	REPEAT CUSTOMER SALES	PHONE-UPS	PHONE-UP SALES	PROSPECT CALLS	PROSPECT CALL SALES	MAILOUTS	MAILOUT SALES	FOLLOW-UP CALLS
<i>Monday</i>													
<i>Tuesday</i>													
<i>Wednesday</i>													
<i>Thursday</i>													
<i>Friday</i>													
<i>Saturday</i>													
<i>Sunday</i>													
<i>Totals</i>													

WEEK OF _____

WEEKLY STATISTICS

<i>DATE</i>	<i>Monday</i>	<i>Tuesday</i>	<i>Wednesday</i>	<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>	<i>Totals</i>
<i>GROSS PROFIT TOTAL</i>								
<i>GROSS PROFIT AVERAGE</i>								
<i>NEW CARS</i>								
<i>NEW TRUCKS</i>								
<i>USED VEHICLES</i>								
<i>LEASED VEHICLES</i>								
<i>SERVICE CONTRACTS</i>								
<i>LIFE ACCIDENT HEALTH</i>								
<i>RUST PAINT FABRIC</i>								
<i>AFTERMARKET SALES</i>								
<i>FINANCE CONTRACTS APPROVED</i>								
<i>FINANCE CONTRACTS DECLINED</i>								
<i>CASH DEALS</i>								

WEEK OF _____

WEEKLY STATISTICS

DATE	UPS	TOTAL SALES	DELIVERIES	COMMISSIONS	REFERRAL SALES	REPEAT CUSTOMER SALES	PHONE-UPS	PHONE-UP SALES	PROSPECT CALLS	PROSPECT CALL SALES	MAILOUTS	MAILOUT SALES	FOLLOW-UP CALLS
<i>Monday</i>													
<i>Tuesday</i>													
<i>Wednesday</i>													
<i>Thursday</i>													
<i>Friday</i>													
<i>Saturday</i>													
<i>Sunday</i>													
<i>Totals</i>													

WEEK OF _____

WEEKLY STATISTICS

<i>DATE</i>	<i>Monday</i>	<i>Tuesday</i>	<i>Wednesday</i>	<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>	<i>Totals</i>
<i>GROSS PROFIT TOTAL</i>								
<i>GROSS PROFIT AVERAGE</i>								
<i>NEW CARS</i>								
<i>NEW TRUCKS</i>								
<i>USED VEHICLES</i>								
<i>LEASED VEHICLES</i>								
<i>SERVICE CONTRACTS</i>								
<i>LIFE ACCIDENT HEALTH</i>								
<i>RUST PAINT FABRIC</i>								
<i>AFTERMARKET SALES</i>								
<i>FINANCE CONTRACTS APPROVED</i>								
<i>FINANCE CONTRACTS DECLINED</i>								
<i>CASH DEALS</i>								

WEEK OF _____

WEEKLY STATISTICS

<i>DATE</i>	<i>Monday</i>	<i>Tuesday</i>	<i>Wednesday</i>	<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>	<i>Totals</i>
<i>UPS</i>								
<i>TOTAL SALES</i>								
<i>DELIVERIES</i>								
<i>COMMISSIONS</i>								
<i>REFERRAL SALES</i>								
<i>REPEAT CUSTOMER SALES</i>								
<i>PHONE-UPS</i>								
<i>PHONE-UP SALES</i>								
<i>PROSPECT CALLS</i>								
<i>PROSPECT CALL SALES</i>								
<i>MAILOUTS</i>								
<i>MAILOUT SALES</i>								
<i>FOLLOW-UP CALLS</i>								

WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
GROSS PROFIT TOTAL								
GROSS PROFIT AVERAGE								
NEW CARS								
NEW TRUCKS								
USED VEHICLES								
LEASED VEHICLES								
SERVICE CONTRACTS								
LIFE ACCIDENT HEALTH								
RUST PAINT FABRIC								
AFTERMARKET SALES								
FINANCE CONTRACTS APPROVED								
FINANCE CONTRACTS DECLINED								
CASH DEALS								

WEEK OF _____

WEEKLY STATISTICS

DATE	UPS	TOTAL SALES	DELIVERIES	COMMISSIONS	REFERRAL SALES	REPEAT CUSTOMER SALES	PHONE-UPS	PHONE-UP SALES	PROSPECT CALLS	PROSPECT CALL SALES	MAILOUTS	MAILOUT SALES	FOLLOW-UP CALLS
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Monday													
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Tuesday													
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Wednesday													
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Thursday													
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Friday													
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Saturday													
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Sunday													
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Totals													
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WEEK OF _____

WEEKLY STATISTICS

DATE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
GROSS PROFIT TOTAL								
GROSS PROFIT AVERAGE								
NEW CARS								
NEW TRUCKS								
USED VEHICLES								
LEASED VEHICLES								
SERVICE CONTRACTS								
LIFE ACCIDENT HEALTH								
RUST PAINT FABRIC								
AFTERMARKET SALES								
FINANCE CONTRACTS APPROVED								
FINANCE CONTRACTS DECLINED								
CASH DEALS								

WEEK OF _____

WEEKLY STATISTICAL SUMMARY

DATE	Week 1	Week 2	Week 3	Week 4	Week 5	Totals
GROSS PROFIT TOTAL						
GROSS PROFIT AVERAGE						
NEW CARS						
NEW TRUCKS						
USED VEHICLES						
LEASED VEHICLES						
SERVICE CONTRACTS						
LIFE ACCIDENT HEALTH						
RUST PAINT FABRIC						
AFTERMARKET SALES						
FINANCE CONTRACTS APPROVED						
FINANCE CONTRACTS DECLINED						
CASH DEALS						

Order Form

as of September 2000 (prices subject to change without notice)

- The Complete Guide To Selling New Cars**
Book — \$12.95 + \$4 S&H Cassettes — \$40.00 + \$5 S&H
- Manager's 52 Week Lesson Planbook**
\$129.00 + \$5 S&H
- Mike Whitty's Basic Selling Skills Video Course**
\$249.00 + \$6 S&H
- Gearing-Up For Management: Effective Leadership**
Manual — \$29.95 + \$5 S&H Cassettes — \$39.95 + \$5 S&H
- Salesperson's Organizational Planbook**
\$27.00 + \$5 S&H (3 month supply)
- What They Didn't Teach You in Basic Selling Skills**
\$60.00 + \$5 S&H 6 Cassettes and Worksheets
- Phone-Up & Follow-Up File Box: Daily/Yearly**
\$24.95 + \$5 S&H
- Service Advisor Training Program**
\$249.00 + 5 S&H
- Carmunicators™ Charitable Promotional Product**
\$3.00 + \$2 S&H
- Phone-Up Response Cards**
\$45.00 (500) + \$4 S&H
- Showroom Customer Log**
\$45.00 (400) + \$5 S&H (2 ply)
- Automotive Salesperson, Inc. Self-Study Business Program**
\$220.00 + \$10 S&H Yearly Tracking Refills \$50.00 + \$6 S&H

Sales Audio Cassettes

- \$20 Phone-Ups & Follow-Ups
- \$20 Negotiations
- \$20 Objections
- \$20 Closing Techniques
- \$20 Persuasive Selling
- \$20 Be-Backs
- \$20 Referrals
- \$20 Psychological Selling
- \$20 The Business Side of Selling
- \$20 Do's & Don'ts of Selling

each package contains two cassettes

Add \$3 S&H each audio

Sales Manager Training Modules

24 audio lessons and worksheets

\$240.00 + \$15 S&H

Management Audio Cassettes

- Sexual Harassment Lesson 1
- Sexual Harassment Lesson 2
- Employee Dismissal
- Make a Profit in New Car Dept.
- Criticism
- Leadership
- Performance Reviews
- Power to Please Lesson 1
- Power to Please Lesson 2
- Automotive Secrets of Atilla
- Dealership Law Tape 1 & 2

**All 12 Audios
\$120 + \$10 S&H
Inc. Worksheets**

For Multiple Orders Call For Shipping Charges	
Total Cost of Order	\$ _____
Shipping & Handling	\$ _____
Sales Tax (MI residents only 6%)	\$ _____
Total Amount	\$ _____
PO # _____	Check # _____

Print Legibly or Staple Business Card

Name _____ Title _____

Dealership Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Bus Fax# _____ Web Site or E-Mail _____

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