

DEALERSHIP ADVERTISING AUDIT CHECKLIST

Work the areas in order once a quarter, and the Tracking, Lead delivery and Sales outcomes rows every month. Each area depends on the one before it: judge creative only after you know its leads reach the CRM. Note what you found beside each row, then fill the Monthly scorecard from your ad platforms and your CRM and compare sources on cost per sale.

CHECKLIST

Area	Check	Where to look	Notes
☐ Tracking	List what each ad platform counts as a conversion (form, call, tap on a phone number) and remove anything that is not a real lead.	Each ad platform, conversion settings	
☐ Tracking	Compare last month's platform lead count with the leads your CRM received from the same source. Record the gap.	Ad platform reports and the CRM Leads view by source	
☐ Tracking	Submit one test form per campaign and confirm the platform records one conversion, not two.	Your phone, then the platform report	
☐ Tracking	Every live ad link carries campaign tags so website analytics can separate each channel.	A sample of live ads	
☐ Tracking	Each source that drives calls (print, radio, listing sites, each ad channel) rings its own tracking number.	CRM tracking numbers and call log	
☐ Account ownership	Every ad account, analytics property, business page and domain is owned by the dealership, not an agency or a vendor.	Account settings, users and billing	
☐ Account ownership	The dealership holds the top admin seat and the billing method on every account.	Account settings, users and billing	
☐ Account ownership	Former employees, past agencies and old vendors are removed from every account.	Users list on each account	
☐ Account ownership	Two step sign in is on for every person with admin rights.	Users list on each account	
☐ Account ownership	The store can see spend, invoices and change history without asking anyone.	Billing and change history	
☐ Targeting	Campaign locations match the ZIP codes your sold customers actually come from.	DMS sold report by ZIP against campaign locations	

Area	Check	Where to look	Notes
☐ Targeting	Search campaigns target people in your area, not people merely interested in it.	Campaign location options	
☐ Targeting	Every ad that mentions financing runs under the platform rules for credit offers.	Campaign category settings	
☐ Targeting	Spend by day and hour follows the hours your store answers calls and texts.	Platform reports by day and hour	
☐ Targeting	Spanish speaking buyers in your market see ads in Spanish.	Live ads by campaign	
☐ PPC	Read the search terms report and add negative keywords for searches you never want to pay for.	Search terms report	
☐ PPC	Match types are deliberate, and brand terms run separately from conquest terms.	Keywords by ad group	
☐ PPC	Ad assets show your phone number, hours and location.	Ad assets	
☐ PPC	Each ad group lands on the page that matches its keywords, not the home page.	Final URLs by ad group	
☐ Creative	Every vehicle shown is in stock today.	Live ads against current inventory	
☐ Creative	Every offer carries its disclosures and an end date the store can honor.	Live ads and offer terms	
☐ Creative	Co op ads follow the manufacturer's current guidelines.	Co op program guide	
☐ Creative	Each campaign runs at least two versions of the ad, compared on leads.	Platform ad reports	
☐ Landing pages	Each ad lands on a page that continues its message (the lease ad lands on the lease offer).	Click every live ad on a phone	
☐ Landing pages	Pages load fast on a phone over a cellular connection.	Your phone, off Wi-Fi	
☐ Landing pages	Forms ask only what the first conversation needs: name, phone, email and one question.	Each form	
☐ Landing pages	A tap to call number on every page rings a tracking line.	Each page on a phone	
☐ Landing pages	The thank you step says who will contact the shopper and how soon.	Submit each form	
☐ Lead delivery	Send one real test lead per source from your own phone and note the time.	Each form, ad lead form and provider	

Area	Check	Where to look	Notes
☐ Lead delivery	The test lead appears in the CRM with the right source label.	CRM Leads view	
☐ Lead delivery	The lead is assigned to a person or the rotation you expect, never left with nobody on it.	Lead record, assignment	
☐ Lead delivery	The assigned salesperson gets the alert on the phone they carry, and the first text goes out under their name.	Salesperson phone and the lead timeline	
☐ Lead delivery	Managers on the source receive their copy.	Manager phones and email	
☐ Lead delivery	Someone calls you back. Record the minutes from submit to first contact.	Your phone	
☐ Lead delivery	Every source shows a recent Last Lead Received date.	CRM Lead Source Settings	
☐ Lead quality	Pull 25 leads per source and sort each one: reached and in market, not ready yet, wrong number or bad email, outside your area, already a customer, never reached.	CRM Leads view by source	
☐ Lead quality	Check the follow up on the same leads: attempts, texts, calls and speed of first contact.	Lead timelines	
☐ Lead quality	Run phone and email validation so bad contact details are visible before judging a source.	CRM validity dots	
☐ Lead quality	Merge duplicates so a shopper who submitted twice counts once.	Merge duplicate records	
☐ Lead quality	Listen to a few recorded calls per source.	CRM call recordings	
☐ Sales outcomes	Divide each source's spend by the vehicles sold to its leads over the last 90 days.	Monthly scorecard tab	
☐ Sales outcomes	Count leads still being worked at day 30 before judging a source.	CRM Leads view by status	
☐ Sales outcomes	Read the lost reasons by source for patterns in lead, inventory, price or follow up.	CRM lost reasons	
☐ Sales outcomes	Match gross from the DMS to the source on each sold lead.	DMS deal report and CRM lead source	
☐ Plan	Sort findings into fix now, fix this month and test next quarter, with one owner and a date for each.	Audit notes	

MONTHLY SCORECARD

Source or campaign	Spend	Leads in platform	Leads in CRM	Contacted	Appointments	Shows	Sold	Cost per sale
☐ Search ads								
☐ Social ads								
☐ Video and streaming								
☐ Listing sites								
☐ Website forms and chat								
☐ Direct mail								
☐ Radio and print								
☐ Exclusive lead program								
☐ Referrals and walk ins								
☐ Other								

Free template from LeadLocate. Run your leads, texting, calling, desking and credit applications in one login:
leadlocate.com/sales-leads