

DEALERSHIP CUSTOMER HANDOFF CHECKLIST

One page for each handoff in the store. Before a customer changes hands, tick each item once it is on the customer record, not just said out loud. The store owns the record, one person owns the relationship at a time, and finance owns the paperwork. Spot check five deals a week against this list.

BDC TO SALESPERSON

Item	What moves with the customer	Where it lives in the CRM
☐ Contact	Name, best phone, preferred way to be contacted and preferred language.	Lead record
☐ Vehicles	Every vehicle the customer asked about, with stock numbers.	Vehicles of interest on the lead
☐ Trade	Year, make, model, mileage and whether there is a loan payoff.	Trade lines on the lead
☐ Payment	Cash, finance or lease, and any monthly payment the customer mentioned.	Lead notes
☐ Timeline	When they want to buy and who else is part of the decision.	Lead notes
☐ Promises	Exactly what the BDC promised: a price, a hold on a unit, a specific test drive. Word for word.	Lead notes
☐ Appointment	Date and time on the calendar, assigned to the salesperson, with a confirmation sent.	Calendar and the lead timeline
☐ Conversation	Every text and call so far, readable before the customer arrives.	Communications timeline
☐ Arrival	Customer flagged as on the lot and the salesperson told.	In Store Now and Team Chat
☐ Introduction	A warm introduction in person whenever the BDC is in the building.	At the door

SALESPERSON TO DESK

Item	What moves with the customer	Where it lives in the CRM
☐ Deal	Deal started from the lead so the customer details carry over.	Start New Deal on the lead

Item	What moves with the customer	Where it lives in the CRM
☐ Vehicle	The unit chosen and a second choice, with stock numbers.	Deal
☐ Trade	Photos, VIN, mileage and the payoff amount the customer gave.	Trade-in form
☐ Numbers	The payment, term and amount up front the customer asked for.	Deal notes and worksheet
☐ Credit	What the customer said about their credit, and whether a co-buyer is signing.	Deal notes and customer profile
☐ Identity	Driver license and insurance card scanned.	Identity scan on the customer record
☐ Documents	Anything the customer brought, uploaded or photographed.	Deal Jacket
☐ Said so far	Anything already said about price, rebates or accessories.	Deal notes
☐ Status	What is done and what is left before finance.	Road to Sale checklist

DESK TO FINANCE

Item	What moves with the customer	Where it lives in the CRM
☐ Worksheet	The agreed structure the desk and the customer settled on.	Worksheet attached to the application
☐ Application	Completed credit application, including the co-applicant.	Credit application
☐ Documents	What the lender will likely ask for, or a list of what is still missing.	Stipulations
☐ Payoff	Trade payoff details and the lienholder.	Deal and application
☐ What was said	Anything the customer heard about rates, terms or approvals.	Deal notes
☐ Lender share	Who the file went to and when.	Lender shares on the application
☐ Back to sales	Delivery plan agreed with the salesperson, who keeps the relationship.	Lead assignment

DEPARTING EMPLOYEE

Item	What moves with the customer	Where it lives in the CRM
☐ Same day	Switch the person off and choose a successor, or mark a temporary leave.	User settings
☐ Open work	Open leads, tasks and appointments moved to the successor.	Lead assignment
☐ History	Notes, texts, calls and deals stay on the record under the original name.	Communications timeline
☐ Rotation	Removed from the round robin rotation.	Lead source assignment
☐ Phones	Removed from call forwarding and ring lists.	Call forwarding settings
☐ Access	Every login reviewed: CRM, credit applications, inventory, account portal, ad accounts and vendor portals.	Account access
☐ Customers	Successor introduces themselves to each open customer within a day.	Texts from the CRM
☐ Book of business	Contacts the person brought are already on the record (import them on day one).	Contacts

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