CRM-01 CRM Track: Product Overview | 45 Minutes

2026

Gain Real-Time Visibility into Pipeline, Performance, and Sales Opportunities

TEKION ONE

Your Monday Morning Outcome

By following this guide, your CRM Dashboard will be configured as your one-stop command center – so you can monitor pipeline health, track team activity, and surface at-risk leads in real time without leaving Tekion CRM Dashboard.

Before You Start

Pre-Implementation Checklist

- **CRM Administrator access confirmed**

  Verify you have Manager level permissions in Tekion ARC.

- **Baseline data captured**

  Export your current Response Effectiveness and Activity Report before configuring so you have a before/after benchmark.

- **Lead sources active and flowing**

  Confirm at least one lead source (website, third-party provider) is connected and delivering leads into CRM.

- **Salesperson AI confirmed in your plan**

  Verify with your Customer Value Manager (CVM) that Salesperson AI and T1 are enabled in your Tekion subscription.

- **Team briefing scheduled**

  Schedule a 15-minute team meeting to walk sales staff through dashboard changes before go-live.

STEP 01/03

Managing the Home Tab

Time: 10 minutes | **Navigation:** Application Grid > CRM Dashboard

Widget	How To Use It
Home Tab – New Retail Leads Widget	Click widget to expand and view unassigned leads; reassign to available rep or reach out to lead from single screen for quickest response.
Home Tab – Appointments Widget	Click double-arrows to expand. Filter by date (use calendar icon, upper right) to check any past or future days. Use in morning sales meeting to set appointment push goals.
Home Tab – Today's Activity & Unresponded Widgets	Today's Activity tracks outbound calls/texts/emails in real time. Unresponded captures all inbound customer replies waiting on a response – get involved early and often.
Pipeline Overview Widget	Configure at least 3 custom quick filters (see Step 3). Train Manager Review stage to active escalation use – not a graveyard.

STEP 02/03

Monitor the Performance Tab

Time: 10 minutes **| Navigation:** Application Grid > CRM Dashboard > Performance Tab

Widget	What To Look for
Store Overview	Check productivity of store within the selected date range. Percentages will display performance over previous same date range.
Leaderboard	See who your top performers are in both Sales and BDC metrics. Reward those excelling and assist those struggling.
Lead Conversion Widgets	Identify where leads may be stalling in the process. Focus training efforts on getting these leads to the next stage.
User Communications	View individual user productivity in communications with leads. Drill down to review all messages from the Communication Hub.

STEP 03/03

Configure Pipeline Overview Filters

Time: 15 minutes | **Navigation:** Application Grid > CRM Dashboard > Pipeline Overview > Manage Filters

Department	Configuration Guidance
Incentive / Vehicle-Specific Filter	Add Filter: select Make, Model, or Lead Provider fields. Example: Make=Chevrolet + Model=Tahoe. Save and publish – all reps see the active incentive bucket automatically.
Custom Stage Filter	Add Filter: Custom Stage = [your stage name, e.g., Competing Offer, Brand Shopping]. Save and publish. Managers see competing-offer customers on login every morning so no deal dies unworked.
Manager Review Escalation Filter	Add Filter: Custom Stage = Manager Review. Save and publish. Every manager sees this list on login – turns Manager Review from a graveyard into an active escalation bucket.

Measure Your Results

Report	Navigation	What to Look For
First Response Effectiveness	Reports > CRM > Response Effectiveness	Leads from inquiry through purchase with conversion rates. Target: see improvement in lead-to-appointment rate within 30 days of dashboard configuration.
User Activity Reports MTD	Reports > CRM > Activity Report	Calls, emails, appointments set, and outcomes by rep. Compare to Today's Activity widget data daily. Correlation between low activity and low sales is your coaching signal.

Best Practices

- [x] **Review the Pipeline Overview daily — not just at month end**

The Pipeline Overview is not a reporting tool – it's a real-time decision surface. Managers who check it at open and at midday catch problems while they can still fix them. Schedule it into your morning routine before the sales meeting.