

Retention Is Revenue After the Sale



Your Monday Morning Outcome

By following this guide, you will have control over the customer lifecycle from the Save-A-Deal meeting, automated post-sale follow-up, and service retention campaigns— so the customer relationship continues building after delivery.

Before You Start



Pre-Implementation Checklist

✓ Identify reasons your leads stall

Document common reasons why your deals may stall in the process. This may be things like being too far away on trade, credit challenges, or others. These will be the categories you will use during your save a deal meetings.

✓ Define optimal post sale follow up messaging

Confirm your ideal cadence on follow up post sale. Determine if this is going to differ for new, used, and certified customers. Consider OEM expectations and survey timing for new customers. Create templates for automated messaging from Communication Templates.

✓ Communication channels confirmed

Confirm SMS and email channels are operational. Lifecycle automation reaches customers across both; if any channel is misconfigured, the workflow has a gap.

✓ Ensure Perpetual Campaigns is on (if applicable)

Perpetual Campaigns should be turned on as part of Tekion CRM Pro. If you have purchased CRM Pro and do not see the Perpetual Campaign toggle when creating a new campaign, reach out to your representative or Tekion Support.



Configure Save-A-Deal Sub Statuses

Time: 20 minutes | **Navigation:** App Grid > Sales Setup > General > Custom Statuses

Setting	Configuration
Create Categories for Stalled Deals	Use the reasons you and your team identified as common reasons for stalled deals. Add each as it's owned Custom Status with a unique color "deal flag."
Add Save-A-Deal Filter to Deals App	From the Deals application, select the Default Filter from the filter list. Update the filter for Status > In > Quote. Add a filter for Sub Status > In > (the categories you've created above). Select Save Filter Group and name this Save-A-Deal.
Add Save-A-Deal Filter to Pipeline Overview	From the CRM Dashboard application, navigate to Home > Pipeline Overview. Select the Pencil Icon to add a new filter to the All Active Leads category. Add a filter for Deal Sub Status > In > (the categories you've created above). Name this filter Save-A-Deal and select Save & Publish.

Configure Post-Sale Follow-Up Automation

Time: 10 minutes | **Navigation:** App Grid > Process Automation > “Sold Process”

Setting	Configuration
Delivery Satisfaction Touchpoint	Three days after delivery, send a satisfaction check. Open-ended question by SMS or email using a template from Communication Templates. Replies route to the salesperson and to the sales manager.
First Service Reminder	45-60 days after delivery, send a first-service welcome. Use OEM recommended intervals if available. Reinforces the dealership relationship and pulls the customer into service before they form a habit with the corner shop.
Accessory and Product Reminders	3-9 months after delivery, offer reminders about additional products that may still be available for the customer (VSCs, Wheel and Tire, etc.) and accessories available. Use conditional based tasking to target messaging based on vehicle.

Configure Service Retention Campaigns

Time: 20 minutes | **Navigation:** Application Grid > Campaigns

Setting	Configuration
Service Retention Campaign	Create a new campaign with a Campaign Objective of Service. Toggle this on as a Perpetual Campaign if applicable. This will allow your campaign to continuously run. Create your target segment by adding filters for Service > Last RO Date > Between > 90 days (or your OEM's service schedule).
Add Additional Service Schedules	Using the Kebab on the previously created campaign, create a duplicate version for other service related reminders like annual inspections, winter tires, exotic service intervals, etc. Be sure to use filters to target the correct audience.



Measure Your Results

Report	Navigation	What to Look For
Communication Hub	Application Grid > Communication Hub	Review automated messaging going out to recently sold customers outbound and inbound.



Best Practices

✓ Closing the deal is the start, not the finish

Most dealers lose touch within the first 90 days post-delivery. Automating the lifecycle touchpoints is the difference between owning the relationship through delivery and owning the relationship through their next vehicle. The investment is configuration once; the return is retention every month after.