

TOYOTA OF KATY · KATY, TX

# \$535K IN 5 MONTHS.

A BDC transformation that lifted both internet and phone conversion — and crushed the district.

Toyota of Katy was generating strong lead volume but converting well below potential on both internet and phone. Over five months of monthly onsite training, Pinnacle rebuilt how the team handled every lead — lifting both channels together and outperforming the entire TMNA district.

## \$535K

INCREMENTAL GROSS  
PROFIT

5 months · 214 units

## 6% → 11%

INTERNET LEAD CLOSE RATE

+83% improvement

## 15% → 22%

PHONE-UP SOLD

+47% improvement

ENGAGEMENT

Onsite Training

PERIOD

Jul–Nov 2025

CADENCE

2-Day Monthly Visits

MARKET

Katy, TX

## 01 — THE CHALLENGE

# HIGH VOLUME, LOW CONVERSION.

Toyota of Katy was generating significant lead volume but leaving money on the table across both channels. Internet closing sat at 6% — well below potential. Phone-up conversion hovered at 15%, with inconsistent follow-up and no standardized approach to turning inbound calls into sold units.

## INTERNET SOLD

**6%**

Converting far below potential.

## PHONE-UP SOLD

**15%**

Calls not becoming appointments.

## DIFFERENTIATION

**NONE**

Toyota.com treated like any source.

## PROCESS

**INCONSISTENT**

Every rep handling leads differently.

## 02 — THE APPROACH

# MONTHLY ONSITE TRAINING.

We deployed a Pinnacle consultant for two-day monthly visits over five months — building sustainable habits through practical application on the floor, not conference-room theory.

## WORKSTREAM 01

**INTERNET LEAD HANDLING**

Objection-handling scripts, a Toyota.com differentiation strategy, and value-based responses for pricing pushback.

## WORKSTREAM 02

**PHONE-UP CONVERSION**

Appointment-setting scripts, a confirmation process, and “why show” messaging that creates real commitment.

## WORKSTREAM 03

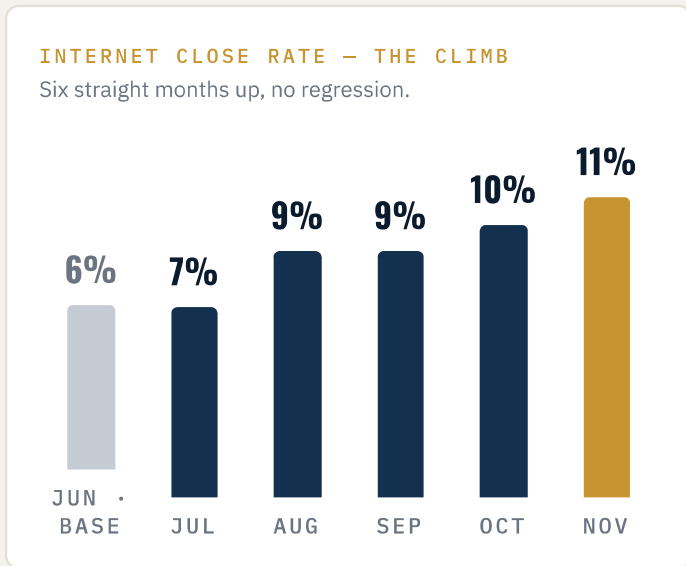
**PROCESS STANDARDIZATION**

Templates in active use, CRM workflows, and accountability metrics the team actually follows.

03 — THE RESULTS

# BOTH CHANNELS MOVING TOGETHER.

|                                                            |                                                            |                                                          |                                                     |
|------------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------------|
| <p>INTERNET CLOSE</p> <p><b>6→11%</b></p> <p>+83% lift</p> | <p>PHONE-UP SOLD</p> <p><b>15→22%</b></p> <p>+47% lift</p> | <p>APPT SET RATE</p> <p><b>44→54%</b></p> <p>+10 pts</p> | <p>SHOW RATE</p> <p><b>57→63%</b></p> <p>+6 pts</p> |
|------------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------------|



**CRUSHING THE DISTRICT**  
LEADVIEW · KATY VS. TMNA DISTRICT AVG · JUL-NOV

|                                                                |                                                                   |
|----------------------------------------------------------------|-------------------------------------------------------------------|
| <p>CLOSE RATE</p> <p><b>15.7%</b> vs 12.5%</p> <p>+3.2 pts</p> | <p>APPT SET RATE</p> <p><b>23.9%</b> vs 18.8%</p> <p>+5.1 pts</p> |
| <p>SPEED TO LEAD</p> <p><b>55m</b> vs 64m <b>9m faster</b></p> | <p>DAYS TO SALE</p> <p><b>4d</b> vs 7d <b>43% faster</b></p>      |
| <p><b>+145</b></p> <p>MORE SALES VS LY</p>                     | <p><b>-10.8%</b></p> <p>FEWER LOST SALES</p>                      |

| MONTH           | OPPORTUNITIES | CLOSE RATE | DELIVERIES | VS BASELINE |
|-----------------|---------------|------------|------------|-------------|
| June (baseline) | 1,813         | 6%         | 113        | —           |
| July            | 1,871         | 7%         | 140        | +27         |
| August          | 2,120         | 9%         | 195        | +68         |
| September       | 1,766         | 9%         | 157        | +51         |
| October         | 1,558         | 10%        | 156        | +62         |
| November        | 1,515         | 11%        | 160        | +69         |

Vs-baseline = deliveries above what the 6% June close rate would have produced on the same opportunity volume.

04 — ROI SUMMARY

# FINANCIAL IMPACT.

**\$535K**

5-MONTH TOTAL  
Incremental gross  
profit

**\$107.5K**

MONTHLY RUN RATE  
**Sustainable**

**\$1.29M**

ANNUALIZED  
PROJECTION  
Projected

**214**

**BDC-ATTRIBUTED  
UNITS**  
Direct contribution  
to volume

## WHY IT WORKED

- Toyota.com differentiation created a unique handling process for high-value leads.
- Monthly reinforcement prevented the training decay of one-off events.
- Sustainable habits were prioritized over short-term activity spikes.
- Templates and scripts were customized and actually adopted by the team.
- Practical floor training — not classroom theory — drove immediate application.

## WHAT'S NEXT

- Unsold Traffic Initiative — a calling campaign with a 50% return-to-buy target.
- Protect the process as the team expands and volume grows.
- Scale to service — the same lead discipline applied to the service lane.
- 12–13% trajectory — current trends point to a still-climbing internet sold rate.

*214 BDC-attributed units is a distinct measure from +145 units vs. prior year.*

**Both channels climbed together and held — proof these are process-driven habits, not a short-term spike. That's what monthly, on-the-floor coaching delivers that one-off training never will.**

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