

Ebook

CRM Best Practices:

Change the Culture of your Dealership



 DriveCentric

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Introduction

There are significant changes in the way vehicles are being sold and purchased in today's market. A simpler, flexible and more personal Customer Relationship Management (CRM) system is the cornerstone to keep dealerships successful. But many stores still struggle with restrictive technology and dated processes.

As CRM technology continues to evolve with growing customer expectations, one thing is consistent. Dealerships using CRMs want great adoption and a strong return on their investment. This Ebook includes best practices auto retailers should embrace to think differently about CRM and their customers' paths to purchase.



Keep it Simple

The relationship between you and your customers is the heart of every dealership.

The best CRM for your business is the one that fits your needs and has a simple User Interface (UI) and software applications your staff will use. Choose an uncomplex system that's flexible, effective and integrates with other dealership software to eliminate inefficiencies. In a nutshell, your CRM should be visual and make it easy to manage your sales and marketing pipeline on any device.



Use CRM Key Performance Indicators (KPIs) to evaluate the success of specific activities or the organization overall. Once you clearly define your goals and set performance metrics, you should measure, evaluate and change them often to align with evolving business goals.



Embrace the System

Many dealers today are fighting to maintain the same level of profitability while doing more with less. It's critical now, more than ever before, to think long-term about how your CRM will scale and grow your business. CRM systems supported by a transactional, one-size-fits-all buying experience no longer fit today's standards for modern engagement tailored to shoppers' communication needs or preferences.

29%

**Improve win rates
with effective sales
coaching**

- Vantage Point Performance

Simplicity, technology, processes and support are the fundamentals of gaining a competitive business advantage. We all know there still may be generational resistance with users over the age of 40 that don't see the value or feel comfortable with modern technology, especially social media, to learn about and manage customers. Executives and Champions are vital to driving adoption and usage among front-line employees.



Effective Ways to Coach Up CRM Usage

- ✓ Identify an internal champion to illustrate the benefits of the CRM and drive value.
- ✓ Provide extensive training on specific functionalities tailored to roles and positions.
- ✓ Map the CRM to operational and sales processes to drive deeper integration.
- ✓ Incentivize usage with contests and rewards aligned with your business goals.
- ✓ Mandate usage during all customer interactions and the path to purchase.
- ✓ Highlight CRM challenges and coaching success stories to keep your team engaged.



AI and Automation

Dealerships must now preside at all touchpoints in this new customer journey to give shoppers what they want, instantly and effortlessly, to shorten the sales cycle.

As competition levels are at an all-time high, AI with machine learning capabilities and automated processes helps dealerships engage shoppers in the manner they expect when buying anything retail.

“We are rapidly running towards a day when 100% of shoppers will be connected 100% of the time.”

- Deloitte Digital

62%

Customers are open to using AI to improve their experiences

- Salesforce

CRM technology is becoming smarter. CRM paired with AI helps dealers learn from interactions with data, simplify forecasting by uncovering hidden or low-funnel buyers and allows your sales staff to do their job faster, more accurately and efficiently with fewer resources.



Mobile

Mobile CRMs are no longer an option. Recent changes in our environment and shopping behaviors require dealership sales staff to use an infrastructure that allows for mobility, fast knowledge sharing and smart communications from anywhere at any time.



A flexible mobile system helps your staff do what they do now, only better. Mobility expands operational efficiency, so you are able to access, track and organize everything that leads to the sale quickly. This mobility is key to providing an extraordinary experience. A mobile system filled with fun engagement features improves overall usage, insightful data gathering and ways to connect in genuine conversations.



Optimize the Value Chain

Interested in centralizing data to make it more useful? Most dealerships say yes. But many still struggle with the ability to gather a holistic view of their customer and sales data due to dated technology, processes and reporting.

Disparate data sources siloed across multiple sources cause a fragmented view of the customer and no one really gets an accurate or complete picture of the customer. Blending CRM, AI and engagement strategies in one place increases your customers' lifetime value by providing a straightforward roadmap to immediate and long-term conversations, automatically moving opportunities through the pipeline based on sales data, customer replies and actions. Dealers need a solution that allows them to monitor conversations and sales activities quickly, increase (productive) engagement, schedule appointments and sell more cars.



Hyper-Personalized Conversations

Auto shoppers now have more choices than ever before. A modern, real-time engagement strategy is vital for dealerships to gain shoppers' attention and evoke action. From tracking data, online behavior and AI to personalized videos, text messages, live streaming and internal workplace messaging platforms, modern applications help dealership sales teams work smarter, not harder, to accelerate lead conversions and sales growth.

84%

**Customers say
the experience a
company provides is
as important as its
products and services**

- Salesforce

Dealerships that embrace conversation technologies engage shoppers more quickly and are able to make high-level decisions using data insights to talk, engage and interact in meaningful and productive ways. This has a real impact on the bottom line by empowering sales reps to eliminate the guesswork from lead scoring and close deals faster while providing a much more genuine buying experience.

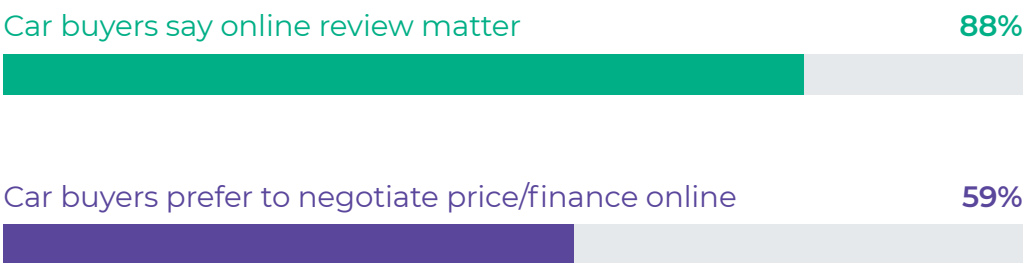


Social Media and Reputation

Over the last several years, social media has become an essential part of the marketing mix, including reputation management. Facebook Marketplace and Facebook Messenger integrations allow dealerships to expand their reach to get more listings in front of interested buyers and capture leads from anywhere, straight inside the CRM.

Reputation is everything. Building a strong online reputation is vital for dealerships to ensure they are trending in the right direction and keeping customers happy. Automated review requests and car buying experience postings help expand a dealership's reach even further.

Merely managing a Facebook page is no longer enough. As social media sites gain traction as a significant influencer in the way vehicles are being sold and purchased, forward-thinking CRMs understand the value of a fully integrated social approach to marketing engagement and buying strategies.



Immersive Experience

Customer experience is the cornerstone of modern retail. As digital retailing tools evolve and continue providing lower-funnel, data-filled leads, dealerships are now able to provide a much more cohesive, omnichannel experience to guide consumers through the sales process.

Modern CRMs are taking it a step further by moving toward a blended, more immersive approach through live video

streaming solutions that help dealerships provide off-site customers a virtual showroom experience. Customers can now see any vehicle they are interested in on the showroom floor by walking the vehicle, pointing out details and features just as you would in a traditional car-buying experience. You can even begin the F&I process remotely. Sales staff should be informed and prepared to answer their questions so they can make a quicker and better-informed decision, including how you can accommodate an off-site test drive.

75%

Customers expect companies to use new technologies to improve their experiences

- Salesforce



Make it Happen

One thing's certain. If you want to stand out in a crowded, competitive space, then you'll want to focus on the next-generation CRM software designed with automotive in mind.

About DriveCentric

Through bold leadership and innovation, the company's offerings include dealership CRM, Genius Artificial Intelligence (AI), conversational engagement tools, enterprise reporting, and so much more.

Talk to an Expert

Data & Insights:

[Digital Air Strike](#)

[Salesforce](#)

[Vantage Point Performance](#)

