

Best Practices Guide

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Welcome

Today's shoppers demand a more efficient car buying experience—one that involves less time spent at the actual dealership. By partnering with Cox Automotive and choosing Deal Central, you've taken the first steps to ensure that your customers get the kind of experience they expect.

A well-executed retail experience will help your dealership work holistically across all channels and departments to close more deals and provide an efficient, seamless, and convenient experience for your shoppers. You'll also create a more efficient deal workflow for your entire sales team, with accurate, consistent numbers across every transaction.

While implementing a new, digitally advanced sales experience can be a significant undertaking, we're here to help. This guide will give you the strategies and tools you need to train your team and successfully adapt your sales process. Use these best practices to get the most out of your new solution.



Evaluate Your Current Sales Process

One of the first steps in implementing a new sales process is to determine your current inefficiencies. This will allow you to make important changes to your culture and hit the ground running to make gains with your new process.

Identify What's Working and What's Not Working

- Look at your customer's pain points to see where your sales process can improve. Do you have any negative CSI survey comments? What about online reviews? Is your sales staff being too pushy with clients, leading to customer dissatisfaction and lengthy negotiations?
- Review your current store policies to find any practices that may stand in the way of a digital deal. These may include taking deposits, holding vehicles, sight-unseen appraisals, and when you're pulling credit.

- Evaluate where you can gain efficiencies through change management. Where are the bottlenecks blocking customer progress? Where is the down time? How much back and forth are you having with customers? How long do they spend in F&I?
- Look for missed opportunities where you can leverage technology to make improvements.

Assess and Confirm Your Vision and Culture

- What type of sales process do you currently have in place (traditional, active, differentiated)?
- Where do you want to be in 6 months to a year? Catch the vision for a digitally streamlined sales process and make it a part of your dealership's culture. Think about how you will empower your staff to drive the sale process through pricing, payments, trade-ins, and two-way communication between you and your shoppers.

What is Your Sales Process?

Static	Modern	Forward-Thinking
Focus is on setting appointments regardless of lead source	Leads are answered with some customization	Deal Central is leveraged to understand buying signals, provided by Cox Automotive data, and to proactively reach out to customers Shoppers are experiencing a personalized browsing experience, including the ability to search by monthly payment and specific vehicle attributes
Sales/BDC not empowered to work payments, price or trade with shoppers	Sales staff picks up where the shopper left off either digitally or in showroom	Single point of contact is empowered to work, structure, and finalize deals. New process and insights are used proactively to reach more in-market shoppers
No differentiated experience for digital deals, online leads, or showroom shoppers	Digital buying experience is promoted on your website	Differentiated experience is promoted through all sales channels with clear shopper benefits. Sales staff is trained and on board

Sell the Experience

Let Your Shoppers Know What's Different

- Tell them how Deal Central gives them a faster, more personalized, more transparent experience.

Be Upfront with Shoppers

- Explain what they can expect from your new sales process.
- Invite a senior leader of your team to record a quick video explaining your new process and what shoppers can expect. Post the video on your website and send it to your customers via email.
- Create a landing page that outlines your new process.

Keep Shoppers Progressing

- Emphasize the steps they can do online in their own time.
- Explain the digital offer process and the collaborative showroom process when customers walk in to help them progress down the sales funnel.
- Let customers know they can pencil their own deal, so they feel in control.

Name Your Experience

- Brand your new sales process consistently across all your digital and physical channels.
- Examples might include, “Fast Buy,” “Express Buy,” “5 Easy Steps,” or “Name Your Payment.”

Promote It Everywhere

- From your website and landing page banners to social media and advertising, market your unique process.
- Take advantage of how-to videos, web/banner assets, and other free resources included in Deal Central.

Lean In

- Leverage your new experience in all shopper communications and needs analyses, so shoppers are aware of what you offer and it doesn't become a gimmick.

Assign Clear Roles and Responsibilities

As customers progress through your sales process, it's important to ensure consistency across your dealership. You want your customers to have a sense of continuity, not confusion by having to deal with a new person at every step. Identify people within your dealership who will be responsible for your new process, then outline clear roles and responsibilities.

Ask yourself how you will structure your sales department to follow your process. Will it look any different than it does today? Do you have the right compensation plan in place? Do you have the right team members that allow you to manage deals more efficiently and ensure that your customers have a great experience?

Identify and Leverage Your Deal Central Champion(s)

- The right retail experience starts with assigning the right people to the right roles. Until your staff is completely comfortable with your new process, it's important to identify a Deal Central champion—a frontline point of contact at your dealership to ensure implementation success.
- You may choose to assign multiple Deal Central champions—a member of your staff and a member of your leadership team (such as a GSM or desk manager), for example.
- No matter who you choose, your champions should understand deal structure and strategy, be trained in best practices, and make deal decisions (or at the very least, be able to quickly connect with a desk manager who can).

Ensure That Each Team Member Understands the New Process and Their Roles

Sales Representatives

Through the sales view, your salespeople will be empowered with the same deal-making experience as your customers, whether online or in-store.

Assess the communication skills of your sales team and decide whether you want to give them the ability to work closely with shoppers on digital deals.

Key Responsibilities

- ☑ Prepare for in-store appointments by thoroughly reviewing shopper and deal insights.
- ☑ Identify where the shopper left off and be prepared to fast forward through the typical sales process to keep the deal moving seamlessly through the sales view.
- ☑ Ensure the selected vehicle is prepped, ready, and parked someplace convenient to the customer prior to the appointment.

- ☑ Engage walk-in customers by working deals side-by-side from anywhere in the dealership or on the lot.
- ☑ Proactively reach out and send offers to customers, leveraging insights from Deal Central.
- ☑ Mention the enhanced/faster process during a needs analysis for showroom shoppers, phone leads, and all other lead sources.

Sales/Desk/BDC Managers

Sales, desk and BDC managers should be empowered to negotiate and finalize deals. In some dealerships, sales managers may serve as a single point of contact for the shopper.

Key Responsibilities

- ☑ Oversee sales staff.
- ☑ Advise on deal structure and negotiations, whether in showroom or remotely.
- ☑ Identify any missing information (i.e. trade appraisal, credit app, etc.).
- ☑ Ensure next steps are assigned to appropriate team members.

Promote 100% Utilization

- Ensure that everyone is on board with your new process. When only half of your staff is involved, it creates more work for your desk managers and other key stakeholders.

Test the Process

- Have each member of your team use Deal Central as a shopper and as a salesperson, so they can understand what's happening on both sides of the deal.
- Build your process, then test, retest, and rehearse every last detail.
- Establish roles, set expectations, and learn how to respond and work deals through the sales view and the manager view.



Know How to Continue the Conversation

Make personalization a part of every deal. Review deal details and leverage buying signals to make every experience unique and to keep your customers moving down the purchase path, without having to repeat unnecessary steps.

Identify Incoming Deals

- Deals will come in through the Deal Dashboard in the manager view. From there, you can click on each customer's name to see real-time updates on deal progress activity, shopper insights, and any outstanding items needed to finalize the deal—all from one convenient customer view.

Leverage Buying Signals and Insights to Personalize Every Deal

- Check your CRM to see the shopper history for each customer. Confirm vehicle availability and review the deal information carefully.

- Take a close look at all deal details, including the customer's preferred down payment, terms, and monthly payment ranges.
- Identify any outstanding questions from the shopper, so that you can address them in your response.

Pick Up Where the Customer Left Off and Collaborate

- If the customer started the deal online, the worst thing you can do is have the customer rehash every detail. Nothing will turn your customers away more quickly than making them repeat steps. Always acknowledge that you know where the customer left off with your dealership.
- Whether that customer calls or walks in, take the time to read the lead details in your CRM, and use the information and insights they've already provided to gain trust and advance the sale.

- If a walk-in customer is not already in your CRM, invite the customer to start building a deal together with your sales staff at the dealership. This experience will build confidence in your sales process and give you a chance to educate your customers, reaffirming that each step they complete on their own will save time and make the experience smoother.

Have Templates Handy with Customized Talk Tracks to Respond to Digital Deals

- Templates can be helpful tools, but they should always be customized and personalized to address any specific questions the shopper has already asked.



Create an Omnichannel Strategy to Reach More Shoppers

Treat Every Deal as an Opportunity to Leverage Deal Central

Don't wait for shoppers to come to you. Use Deal Central to proactively reach out to them. Comb through your CRM to see customer behaviors, identify active shoppers, and send personalized deal links to proposals.

Use this time to coach customers on how to start a deal with Deal Central and send communications to those who may be asking about vehicle availability. Structure deals for shoppers, based on their activity.

Examples of Proactive Use

Deal Central can be used proactively in many scenarios. Here are a few examples to help you get the most out of your solution.

Trade-in Customers, Lease-Ends, Phone-Ups, and More

All of these shoppers are potential buyers. Take the first step, without asking them to come into the dealership. Send them a digital offer, personalized to their potential needs/interests.

- **Example:** Many dealerships send email blasts to their existing customers looking for trade-ins. Why not send these customers a personalized message and a link to a deal they can't resist?
 - ☑ "Hi, Mr. Shopper, we're looking to buy trade-ins just like your car. Here's a deal structure that allows you to trade in your existing vehicle and get a new one for a similar monthly payment."

Service Drive Customers

Your service drive is a potential gold mine for car sales. Your service customers are already comfortable with your dealership—they trust you with their vehicle and they’re paying for service—and they may be reluctant to put more money into their current cars.

- **Example:** Invite a salesperson to visit the service drive and strike up a conversation with customers who are waiting for their vehicles. Put your showroom experience on a tablet and start a deal with the customer right then and there. You could also send digital links to service customers later.

☑ “Hi, Service Customer, here is your car’s trade-in value. Here is a deal on a similar car to the one you’re driving. And here’s a great deal on an upgrade.”

Lot Sales and Off-Site Events

Shoppers typically feel less pressured when they’re outside perusing vehicles on their own. How do you capture interest (and leads) without forcing these shoppers into your showroom?

- **Example:** Try this at your next sales tent event: Include a QR code on a window sticker that links to the vehicle deal pages on your website for a few select vehicles you want to move. Have a salesperson handy to start a deal on a tablet, side-by-side with the shopper.

Give Your Showroom a Makeover and Keep Your Shoppers Engaged

Be Ready for Walk-in Customers

Prepare point-of-sale materials or signage that explains your new sales process.

- **Examples:**

- ☑ “We do things differently here at ROI Motors. Ask about our FAST digital showroom.”
- ☑ “Check out our digital showroom” (with a QR code that links to a simple infographic about your new, innovative process).

Leverage Your Showroom Screens

- While they're waiting, customers are likely to look around your showroom. Use your showroom space to reinforce your value proposition and differentiation.
- Show showroom shoppers a looping presentation about your new sales process.

Give Customers More Control

- Provide kiosks or tablets for walk-in customers to start the process digitally on their own. This will give your shoppers the feeling of having more control.
- Allow customers to start the sales process and input information on their own, freeing up your sales staff on a busy Saturday.

Emphasize Education and Collaboration

- Give customers the tools to educate themselves and explore the deal further while in the showroom.
- Plant the F&I seed by educating shoppers via short videos.
- Invite your customers to work side-by-side with your sales staff on a tablet to build a deal on their dream vehicle, emphasizing education and collaboration. You'll end up with happier customers (who are less likely to negotiate) because they feel they've worked in partnership with a sales team member to build their own deal.

Ready, Set, Go

Once again, congratulations on taking the first steps to give your customers the kind of shopping experience they expect. With the power of Cox Automotive and Deal Central, you get one view of the customer and one view of the deal in an unmatched, intuitive experience that puts exclusive insights to work for you. And we're here to help every step of the way. Implement these best practices and refer to this guide as you adapt your new process to close more deals, provide better shopper experiences, and get the most out of Deal Central.

5 Key Takeaways

- 1** Let your shoppers know how your new process is different
- 2** Ensure every team member understand their roles and the new process
- 3** Use the shopper's information and insights to advance the sale
- 4** Treat every deal as an opportunity to use Deal Central
- 5** Leverage your showroom to proactively engage shoppers

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