Through the delivery of faster, more personalized, more convenient customer experiences, DealerSocket CRM enables dealers to differentiate themselves from the competition and drive greater customer loyalty. With custom configurations designed to meet the specific needs of each dealer (and their employees), this CRM adapts to changing customer, business, and market needs. Seamless integration processes for service, desking, data mining, website leads, and digital retailing all function within the CRM. On the back end, the CRM offers extensive reporting options so dealers can monitor performance. Automation workflows available within the CRM allow employees to trigger relevant text and email communications when meaningful activities occur. DealerSocket CRM syncs the dealer's sales processes across all devices, enabling dealers to manage their day-to-day from phone, tablet, or desktop without disruption.

The Problem:

No two dealerships are alike – their preferences, practices, and sales processes differ. However, nobody wants to click 8-10 times to get to the information they need or make a stripped down CRM work for the complex needs of a dealership. It's often a battle to get the sales team to effectively use the CRM, but a robust, intuitive, and configurable CRM is critical for achieving maximum product utilization and delivering faster, easier sales interactions.

How It Works:

Sales teams are empowered to simplify day-to-day tasks and improve customer pipeline management with configurable dashboards, checklists, and work plans. Using a robust, yet simple-to-use mobile app, DealerSocket CRM's texting and mobile sales capabilities ensure salespeople are armed to engage with customers quickly. Real-time notifications and built-in email and text templates prompt a timely response from the sales team. Mobile desking and driver's license scanning ensure more in-store, value-added time is spent focused on the customer's needs. From lead routing to customer outreach, dealers have the freedom to customize and automate workflows with DealerSocket CRM's business rules and Smart features. These features work on behalf of sales teams 24/7 and are triggered by customer characteristics and behaviors, saving significant time for staff while creating personalized experiences for customers.

DealerSocket CRM

A powerfully dynamic CRM that automates activity and personalizes touchpoints to create a frictionless connection between salespeople and their customers.

"DealerSocket is the greatest accountability machine. Looking at the data, I can pinpoint which dealerships are just clicking buttons and which dealerships are actually doing what they are supposed to be doing."

Geno Walsh
Executive Manager
of Retail Operations
Qvale Auto Group

DealerSocket®

www.DealerSocket.com

"From individual stores to nationwide groups, DealerSocket CRM provides a rich feature set through a modern interface, both of which are amplified by consistent, user-guided innovations."

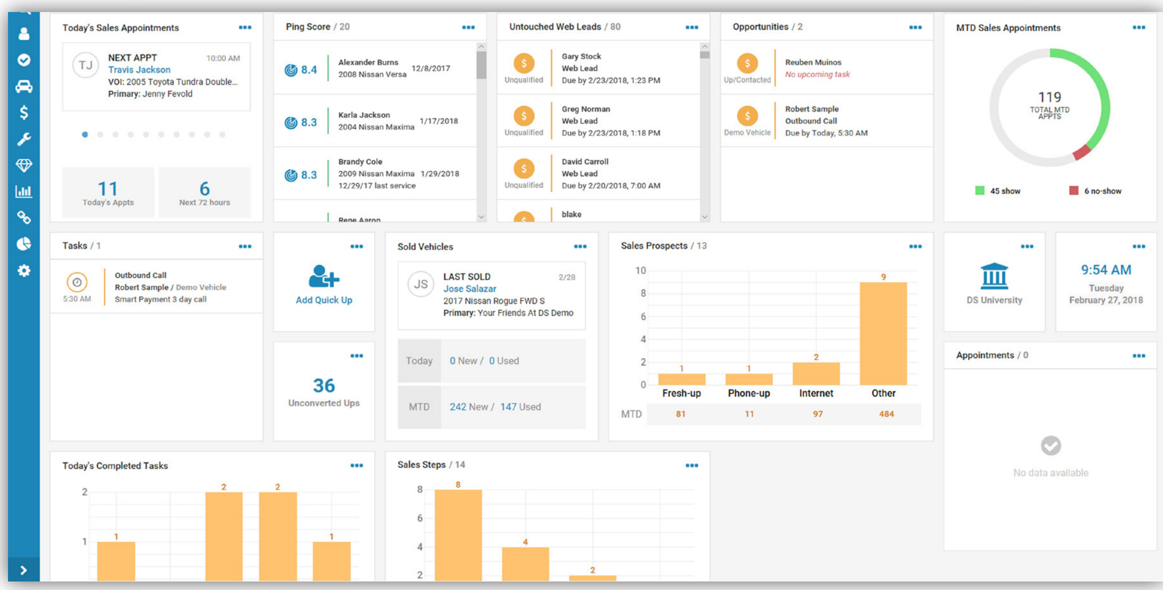
Darren Harris
EVP & General Manager,
Retail Solutions
DealerSocket

DealerSocket's CRM goes beyond industry standard systems to centralize and then amplify customer intelligence all within one system. DealerSocket CRM's sales reporting is one of its most popular features because it's accurate, reliable, and devoid of clutter. Sales leaders get a centralized view of sales performance drivers and, through the system, can create a culture of accountability and motivation centered around shared goals and expectations.

DealerSocket CRM's core package includes sales floor tracking, internet lead management, mobile sales app/DL scanner, sales management, marketing, and reporting. Dealers have the option to add texting packages, desking, data mining, digital retailing, call management, database cleansing, analytics, credit application management, and service scheduling/management. Additionally, they can activate DealerSocket's integrated websites, inventory management, and digital marketing services for the added convenience of connected technology management under a singular umbrella.

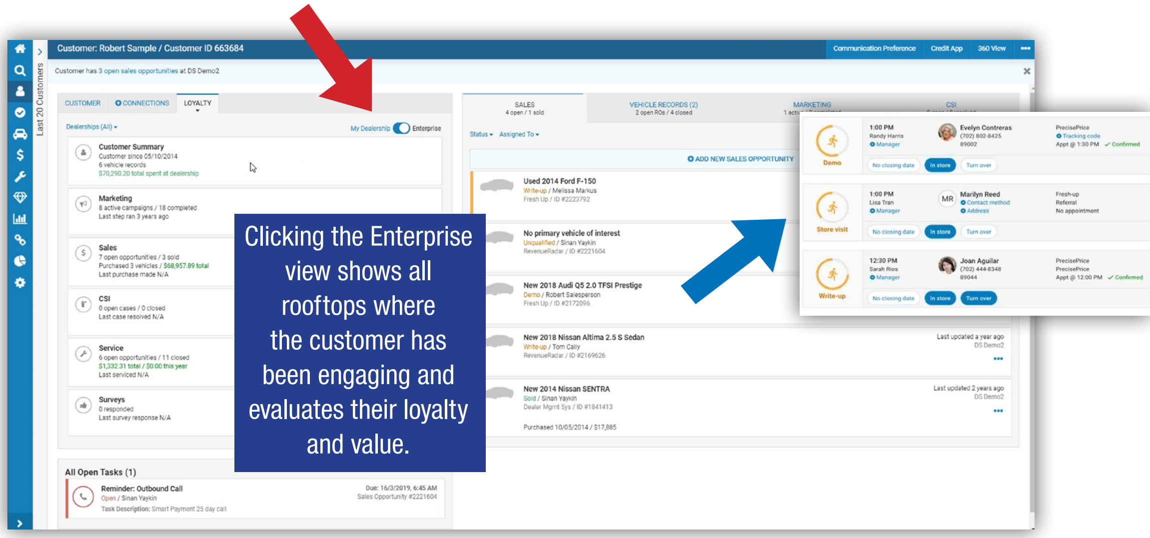
Upgraded Features this year: New Desking, New Desklog, SocketTalk Upgrade, and Facebook Integrations.

Personalized CRM Experience. DealerSocket's robust CRM can be personalized right down to each employee and also can scale to support Enterprise level management needs. Through a custom dashboard, each salesperson can quickly access critical items they need such as quick ups, tasks, appointments, leads, sales process, sold data, and performance tracking. The dashboard is responsive and works just as well on tablet or phone as it does on desktop. A salesperson can see any activity they consider important for daily activities. They may want to monitor how many outbound calls they have completed for the day, stay on top of their working deals, or add to their to-do list.



At the Enterprise or group level, the CRM also easily accommodates a multi-rooftop setup, shared customer/inventory views, customer loyalty analytics, group programs, lead type/source, lost deal identifier, etc. Dealer Socket is NOT an out-of-the-box CRM; it is custom configured to move the needle based on a dealership's sales and service processes.

Enterprise Search and 360 view. If a customer calls and has any questions about an interaction with the dealership, the salesperson can click on 360 View (see blue arrow) in their profile and within seconds, their complete communication history is listed; the last service they had, the last employee to interact with them, or an email campaign they received. It's a centralized filing cabinet of that customer across multiple opportunities – phone calls, texts, emails, and visits. This functionality was requested by dealers and is one of the most used screens.



The ability to integrate multiple dealership data sets into a single DealerSocket site and recognize the customer relationships that may exist over multiple dealership is a complex, ground-breaking technology.

Sales Process Checklist. If there is a specific sales process checklist that the dealer wants the sales team to follow, DealerSocket builds that out. The salesperson can quickly go into a customer record and see what items still need to be accomplished. Pictures or videos could be included here – proof of income or video of the customer with their new vehicle. Turnover in dealership staffing is well-documented so a checklist can ensure that correct processes are followed by the new employee. Managers can monitor these checklists from their desktop and recognize if some critical activity has been missed.

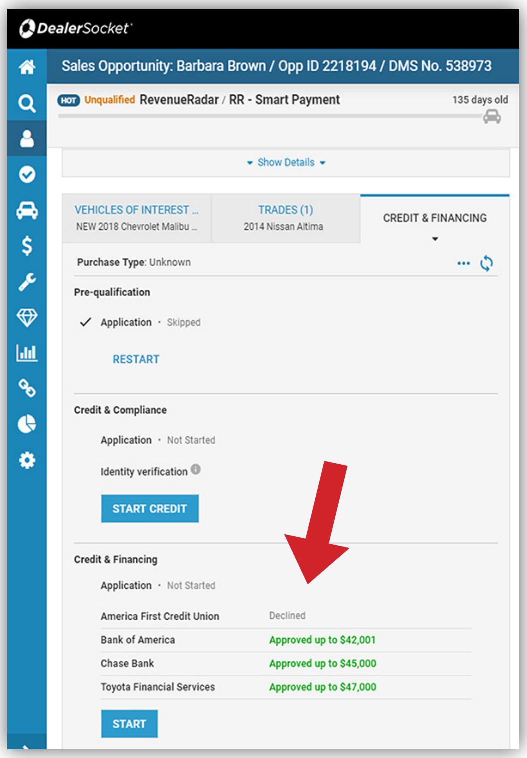
Customer Success Strategy. DealerSocket uses strategic partnerships and proactive consulting to help effectively evaluate results at the corporate and store level. The goal is to understand what's important to the store and how DealerSocket can assist in ensuring that target KPIs are met – this could be a detail like 'create 2 appointments per day' or 'make 10 outbound calls per day.' DealerSocket works with each store to set a benchmark for what 'good' looks like and subsequently their reporting visually helps evaluate performance. The manager can quickly see that appointment confirmation percentages are all in red so that is an area that needs work. This generates a conversation: What do we need to do to elevate these KPI results?

Mobile Sales Process. Additional consistencies have been added between the mobile app and the core CRM functionality. Using the mobile app and an inventory-first approach allows the salesperson to match a vehicle to the customer before they are even added to the CRM. Inputting prospects is quick and simple on mobile with the added ability to use the driver's license scanner which will automatically check the CRM for duplicates. The scanner can also be used to grab a VIN number to pull in a trade and push that to the inventory management tool being used. The sales team can quickly engage with text messages on their mobile app and from their desktop. With outbound click-to-call, their outreach is recorded, timestamped, and provides duration. Email communication from mobile is also easy and templates are simple to customize, right on the smartphone.

Proactive Alerts. Tasks are effectively served to the sales team through mobile messaging. Based on the functions which are critical to their role, time-sensitive items can pop up on the salesperson's phone or desktop such as: new emails received from customers, lead reassignment, customer website visits, appointment reminders, customer in service in equity, or a selling price alert. These alerts help drive CRM use because it is providing actionable information for the salesperson so they can be responsive to the customer.

Smart Technology. Dealers can increase efficiency and marketing effectiveness with enabled Smart Technology. Smart Filters can be used to identify and build customer groups for maximum efficiency. For example, a sales manager could build a database of all Expedition owners and then segment it by lifecycle in order to nurture and engage customers at the appropriate time with the correct message.

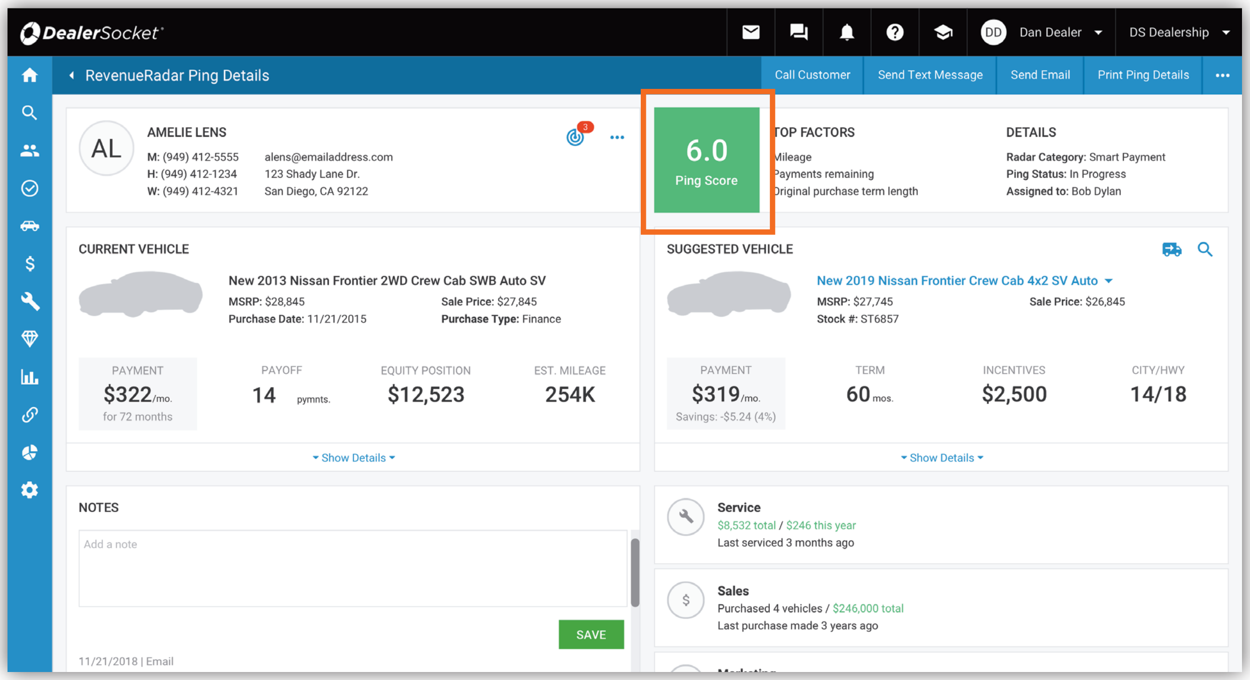
Smart Links can be embedded in emails such as a new model notification to customers or a link to service specials. The customer clicking on a link will automatically be enrolled in a follow up. Smart Links will also clean up vehicle ownership. The customer is asked if they still own the vehicle and if they click 'no,' their record is revised to reflect 'inactive' and marketing ceases.



SocketCredit. NEW. A streamlined and integrated credit workflow, SocketCredit allows for a faster and safer crediting experience with built-in compliance. The F&I Manager can handle all the crediting tasks from one system without having to work in separate silos for credit and CRM data. If a customer fills out the credit app online, it pulls directly into the CRM line-for-line. A credit application link can be sent to the customer's phone and their submission will NOT create a duplicate lead in the system. A one-click integration can send the application to the various lending portals like RouteOne or Dealertrack. The approval dispositions are updated in real time and the salesperson will get an alert about the status change.

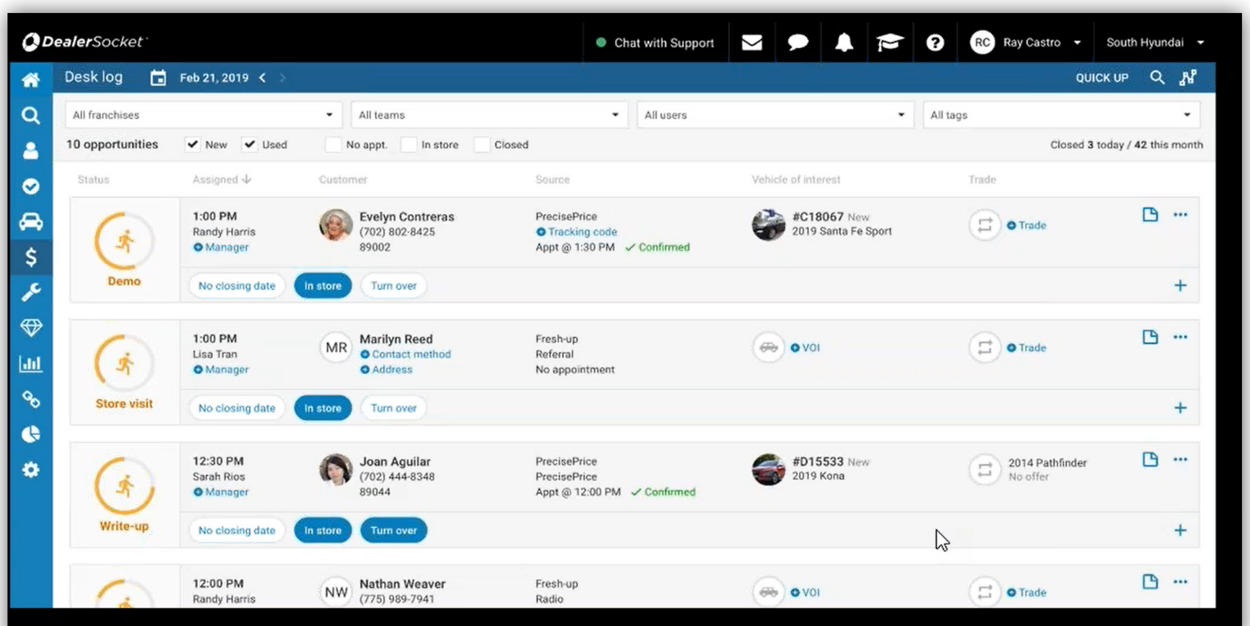
Revenue Radar. Residing within the CRM, this data mining tool allows the sales team to work only in the CRM and not be required to open multiple silos of technology. It identifies key opportunities across sales and service.

Driving Sales Accountability and Performance. Managers are encouraged to establish performance standards for their salespeople to ensure they spend time doing a daily check out. This scoreboard shows day-to-day performance in one view; current activity and month-to-date. *Is the sales team entering new prospects? Are they setting and confirming appointments? How many phone calls have connected? Are they receiving communication back from customers? How many emails are going out and how many are coming back?* It's an excellent coaching tool for managers.

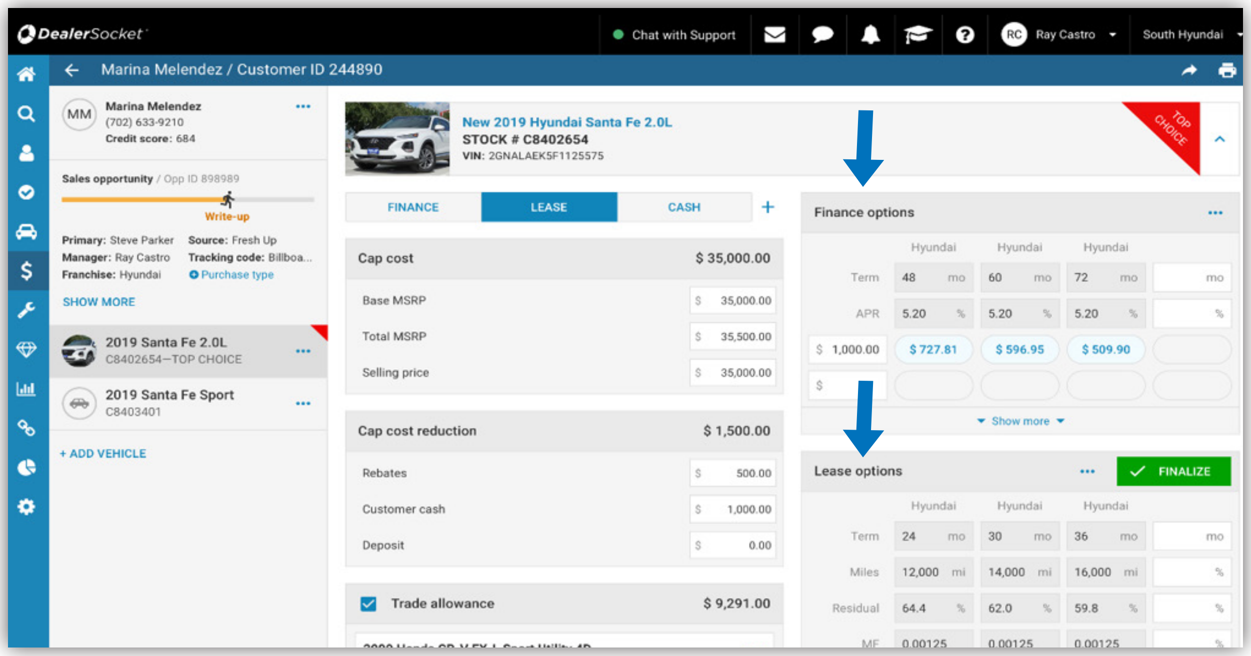


Machine-Learning Powered Ping Score. Customers with a high 'ping score' are important and represent the lowest cost of acquisition (see red box). The score is based on 20+ attributes that update the weighting and prioritization in real time using key drivers of comparative payment savings, equity, incentives, and term. The highest score pings can 'drip' into the campaigns before lower score pings. A new feature this year utilizes an intelligent logic to determine the 'likelihood to buy' using attributes such as how often the customer is visiting the site, proximity to dealership, the last time they serviced at the dealership, amount of equity, etc.

Desklog. NEW. With a more modern look and providing consistency across the entire platform, the new Desklog performs more efficiently. A sales manager can now see what stage the customer is in, and the Desklog matches the same flow that is set up for the sales process.



Re-writing the Desking Tool. By watching hundreds of managers desk deals and salespeople trying to figure out desking, DealerSocket's desking tool has been reconfigured to be more intuitive. It's easy to handle math within the platform; the comparative matrix is readily visible (see blue arrows) and the ability to update the write-up based on the deal that the customer chooses are important improvements. Throughout the course of a write-up process, the F&I Manager might pencil 5 or 6 times. The Desking Tool can recall back to that exact scenario the customer preferred – this ability saves significant time from re-keying the information. UI and UX improvements make this a more efficient workflow to get more deals closed.



Automated Marketing. Comprehensive marketing designed around inventory and customer lifecycle is automated and practically unlimited in creating possible marketing strategies. DealerSocket pulls in sales, service and parts, and customer engagement data across the database and automates marketing campaigns based on that data. The stage in the customer's buying lifecycle is determined and the appropriate message for them is identified BEFORE any messages are delivered into the competitive marketplace. Marketing is also NOT an out-of-the-box package; it can be built to align with the dealer's own marketing goals and interests using an unlimited number of business rules.

Facebook Integrations. NEW. Dealerships are looking for ways to be more efficient with their digital marketing. Tying digital marketing into the CRM allows dealers to more accurately target prospective buyers and service opportunities. They can link actual activities at the dealership by adding those as campaign milestones, and then develop a Facebook audience and market to those people specifically. For example, the dealership can develop an audience of anybody who has interest in an F-150, then further define those that took a test drive. This can be a multi-faceted F-150 campaign that has different messages for evolving behaviors.

SocketTalk and Texting. Baked into the CRM, SocketTalk's texting functionality is a major enabler for the sales teams. SocketTalk provides desktop and mobile-based texting with flexible features, including the ability to customize opt-in messaging, use photos and videos, and build cross-departmental efficiency with text templates and text-specific performance reporting.

Reporting. With pre-built templates and a variety of flexible customization options, reporting with DealerSocket CRM is nearly limitless. DealerSocket builds reports for all sales, marketing, and service actions and empowers users with their relevant data and insights. Additionally, the system can track and report on CSI performance, data mining opportunities, web leads, and beyond.

DealerSocket works with OEMs across the world and holds status and certification in nearly 80 programs. A variety of APIs provide seamless experiences for OEMs looking to share valuable data with their dealers as well as pull insights from their dealers to deliver more convenient, personalized consumer experiences.

What do dealers say about DealerSocket CRM?

"I can basically do anything I want at any time I want and not have to wait on anyone. With other CRMs, you have to call the provider when you want to make a change and wait for up to 24 hours for them to get back to you. With DealerSocket, I don't need to call, I just do it."

Adam Smith
Internet Sales Director
Westbury Toyota