

A GUIDE TO DIGITAL RETAILING

ROLES, RESPONSIBILITIES & BEST PRACTICES




DIGITAL RETAILING ROLES & RESPONSIBILITIES


Overview


Realizing success with digital retailing begins with identifying the people within the dealership who will be responsible for digital retailing. Job titles and responsibilities will vary based on a dealership's staffing model.


Typically, a **Team Approach** is adopted as the model for handling digital retailing shoppers:





A **Team Approach** requires a team of people who can work together to provide a seamless online to in-store digital retailing experience for your customers.

 RECEPTION

 DIGITAL CONCIERGE

 DIGITAL SALES CONSULTANT

 DIGITAL DESK MANAGER

 F&I MANAGER

Alternatively, some dealerships may adopt a **Single Point of Contact Approach**:



A **Single Point of Contact** is empowered to handle a deal from lead to purchase. This streamlines the sales process and provides an enhanced customer experience.

 DIGITAL SALES MANAGER

Resources

An outline of key responsibilities for each role are provided, for both a Team approach and Single Point of Contact approach.

TEAM APPROACH



YOUR DR TEAM: RECEPTIONIST DIGITAL CONCIERGE DIGITAL SALES CONSULTANT F&I MANAGER

SINGLE POINT OF CONTACT APPROACH



YOUR DR TEAM:

- RECEPTIONIST
- DIGITAL SALES MANAGER
- F&I MANAGER



DIGITAL CONCIERGE

Current Roles within Dealership may include:

- BDC
- Sales Consultant
- Internet Sales Consultant

Overview

The Digital Concierge communicates and sets the first impression with the shopper before they come into the store. Additionally, being able to save the customer time and deliver a seamless purchase experience depends on the Digital Concierge collecting as much information from the shopper ahead time (i.e. trade information, deal information, credit application), prepping the deal jacket and communicating all of this to the appropriate team members (i.e. Sales, F&I) prior to the appointment.

Key Digital Retailing Responsibilities:

- Prioritize digital retailing leads and give them immediate attention
- Carefully read and interpret any lead information submitted, including price and financing
- Identify any missing information (i.e. trade appraisal, credit app) and request from shopper
- Respond to shopper with quality response
- Determine counter offer by working with Sales and F&I managers, or using negotiation parameters
- Schedule and confirm appointment with shopper
- Hand-off or communicate shopper deal and appointment information to appropriate team members





DIGITAL SALES CONSULTANT

Current Roles within Dealership may include:

- Sales Consultant
- Internet Sales Consultant
- Sales Manager

Overview

Preparing for the in-store appointment by fully reviewing their online submission helps the Digital Sales Consultant meet the shopper where they are in their car buying process and create a seamless online to in-store transition. The Digital Sales Consultant should also remember to give the shopper a voice on how to proceed – in today's world, that is what they expect.

Key Digital Retailing Responsibilities:

- Prepare for in-store appointments by reviewing shopper and deal information thoroughly
- Identify where the shopper has left off in their buying process, and be prepared to fast forward through your typical sales process to pick up where they left off online (do not make the customer start over!)
- Ensure the selected vehicle is prepped, ready, and conveniently parked prior to appointment
- When shopper arrives, acknowledge/confirm any prior communication and deal information submitted, then offer options for how to proceed
- Start F&I and trade appraisal process while working with the shopper on other steps like the test drive





DIGITAL SALES MANAGER

Current Roles within Dealership may include:

- Sales Person
- Internet Sales Manager
- Sales Manager

Overview

The role of the Digital Sales Manager combines the responsibilities of the Digital Concierge and Digital Sales Consultant, serving as a single point of contact for the shopper. This includes lead handling, online shopper communication, as well as the in-store appointment aspects. Whether F&I responsibilities are included in this role or not will vary by dealership. This role should be empowered to negotiate and finalize a deal.

Key Digital Retailing Responsibilities:

- Prioritize DR leads and give them immediate attention
- Carefully read and interpret any lead information submitted, including price and financing
- Identify any missing information (i.e. trade appraisal, credit app) and request from shopper
- Respond to shopper with a quality response
- Determine counter offer and handle negotiations, when applicable
- Schedule and confirm appointment with shopper
- Prepare for in-store appointments by reviewing shopper and deal information thoroughly
- Ensure the selected vehicle is prepped, ready, and conveniently parked
- When shopper arrives, acknowledge/confirm any prior communication and deal information submitted, then offer options for how to proceed
- Start F&I and trade appraisal process while working with the shopper on other steps like the test drive





DIGITAL DESK MANAGER

Current Roles within Dealership may include:

- BDC Manager
- Internet Sales Manager
- BDC Director
- Sales Manager

Overview

The Digital Desk Manager oversees the Digital Concierge or Digital Sales Consultant. While the Digital Desk Manager is not typically involved directly with the shopper, he/she manages their team to ensure processes are being followed.

Key Digital Retailing Responsibilities:

- Oversee Digital Retailing team members
- Advise on deal structure and negotiations
- Ensure next steps are assigned to appropriate team members





DIGITAL BUSINESS MANAGER

Current Roles within Dealership may include:

- F&I Manager
- Business Manager

Overview

The more information submitted by the shopper upfront in the Cox Automotive Digital Retail experience, the faster the desking process goes; in fact, a thoroughly completed submission saves, on average, 30 minutes in completing the sale. Be familiar with the payment amount that was agreed upon as well as the F&I products selected, if applicable.

Key Digital Retailing Responsibilities:

- Prepare for in-store appointments by reviewing shopper and deal information thoroughly
- Identify any missing deal information and determine how to resolve
- Start F&I process while the Digital Sales Consultant works with the shopper on other steps, (i.e.) the test drive
- Review credit application (if submitted online) and work on getting approval from lenders prior to appointment
- If there is any deviation in deal numbers from the quote provided, provide a thorough explanation
- Review any F&I products selected online and tailor menu presentation accordingly





RECEPTIONIST

Current Roles within Dealership may include:

- Receptionist
- Front Desk
- Greeter

Overview

The Receptionist is possibly the first person the shopper will encounter in their online to in-store transition. A receptionist who acknowledges the time the shopper has already invested online and elevates their in-store status sets the stage for a positive experience at your dealership.

Key Digital Retailing Responsibilities:

- Be aware of digital retailing process and benefits to shopper
- Check appointment board for any upcoming digital retailing shopper appointments
- Establish custom greeting for digital retailing shoppers
- Check in shopper (or start showroom visit) to notify sales person or sales manager of shopper's arrival
- Handoff to assigned sales consultant or manager
- For appointment no-shows or late arrivals, notify sales manager to determine custom shopper follow-up





BEST PRACTICES



IDENTIFY THE DIGITAL RETAILING LEAD



For dealerships utilizing a Team approach, the role of **Digital Concierge** is charged with identifying digital retailing leads in CRM.

How to Identify a Digital Retailing Lead in CRM

As shoppers interact with Cox Automotive Digital Retailing on your website and/or classified listings, the following actions can trigger a lead being sent to CRM:

- **Deal Submitted**
- **Vehicle Protection added**
- **Test Drive scheduled**
- **Credit App submitted**
- **Vehicle reservation submitted**

Both the action the customer completed, and the site they completed it on (i.e. Dealer.com website, Autotrader or Kelley Blue Book) dictate the way the lead source displays in your CRM.

Lead Sources

Here's a list of common lead sources for Digital Retailing deals:

- Accelerate - Dealer.com - Deal Events
- Accelerate - Autotrader - Deal Events
- Accelerate - KBB - Deal Events
- Cox Digital Retailing - Credit App (Credit App only sent from eBiz)
- Dealertrack Digital Retailing





Note: Certain lead management systems and/or CRM systems may alter the lead source names, causing them to appear differently from above.



ANATOMY OF A DIGITAL RETAILING LEAD



For dealerships utilizing a Team approach, the role of **Digital Concierge** is charged with reviewing all digital retailing leads in CRM.

HOW YOU DO IT TODAY...	HOW IT WORKS WITH DIGITAL RETAILING
 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="button" value="Get a Price"/>	   2017 Mini Van \$49,500 Price \$519 per month 60mos / 6.99% APR / \$5,250 down \$8,427 Trade Value 2012 Truck / 87,326 miles / Fair Condition) My name is Ann, credit score is 680 680 Credit Score / Shopping for \$400 - \$450 payment Vehicle Protection 3-yr Prepaid Maintenance / Appearance Protection Pre-Approved \$53,000 / Tier 2 / 5.49%

When Reviewing a DR Lead:

- Check to see if there is existing shopper history in CRM
- Confirm vehicle availability
- Review deal information carefully, (digital breadcrumbs):
 - ✓ Date & time lead came in
 - ✓ Name of shopper
 - ✓ Vehicle of interest
 - ✓ Comments
 - ✓ Deal Terms
 - ✓ Trade Valuation
 - ✓ Reservation
 - ✓ Vehicle Protection
 - ✓ Test Drive Appointment
- Determine counter offer
- Identify any outstanding questions from the shopper so that you can address them in your response



ANATOMY OF A DIGITAL RETAILING LEAD

VinSolutions CRM Example:

Comments	<p>ADP 4.18p By: System</p> <p>Offer Received:</p> <p>Comments: here is my comment on this deal</p> <p>Vehicle: Year: 2017 Make: Nissan Model: Altima Trim: 2.5 S VIN: 1N4AL3AP3HN309121 Offer:</p>
Deal Terms	<p>Monthly Pmt: \$374 MSRP: \$24,490</p> <p>-----</p> <p>My Offer: \$19,000 Specials: \$500 Adjusted Cash Down: \$1,658 Net Trade-in Value: \$4,245 Total GAP Protection: \$600 Road Hazard: \$895 Prepaid Maintenance: Call for Price Taxes: \$1,938 Dealer Prep Fee: \$100 Misc Fee: \$200</p> <p>-----</p> <p>Total Financed: \$16,330</p> <p>-----</p> <p>Adjusted Cash Down: \$1,658 Documentation Fee: \$500</p> <p>-----</p> <p>Due At Signing: \$2,158</p> <p>-----</p> <p>Term: 48 APR: 4.68% Shopper Credit Tier: Good</p>
Trade Valuation	<p>Trade In: Year: 2006 Make: GMC Model: Durango Trim: SLT Pickup 4D 5 1/2 ft VIN: Not Available Offer amount: \$4,245 Amount Owed: \$0 Net Equity: \$4,245 Shopper Phone Number: 234-123-4324</p>
Reservation	<p>Ownership Type: Purchase Condition: Good Mileage: 120000</p> <p>Reservation: Status: Submitted Created On: February 28th 2018, 8:24 pm</p>
Vehicle Protection	<p>Vehicle Protection Programs: Interested in Total GAP Protection at a total cost of 600 Interested in Service Agreement at a total cost of 600 Interested in Road Hazard at a total cost of 695</p>
Test Drive appointment	<p>Test Drive: Shopper: brett pomerantz Day: February 28th 2018 Time: morning Email: brett.pomerantz@gmail.com Phone: 234-123-4324 Message: I'm coming around 3pm today</p>



RESPOND TO DIGITAL RETAILING LEADS



For Dealerships utilizing a DR Team Model, the role of **Digital Concierge** is charged with responding to all DR Leads in the CRM.

Auto-response

Accelerate Digital Retailing sends an auto-response email notification upon completion of any deal event by the shopper (i.e. deal submission, test drive scheduled, credit app submitted, etc.)



2018 Audi Q5
2.0T Tech Premium
16 miles
VIN# WA1BNAFY2J2236730

Hoffman Audi of New London
490 BROAD ST
NEW LONDON, CT 06320
<https://www.hoffmanaudiofnewlondon.com/>

My Deal Summary

Est. Monthly Payment	\$748
MSRP	\$49,550
My Asking Price	\$45,000
Specials	- \$750
Cash Down	- \$2,000
Taxes	\$2,889
DMV Fees	\$150
Conveyance Fee	\$499
Total Financed	\$45,788
Cash Down	\$2,000
Due At Signing	\$2,000
Term	72
APR	5.49

Your Deal
\$748/mo
Estimated Payment
Your Message to the Dealer
Can I pick up today

View Deal

What's Next?
Someone from our dealership will review your deal and respond to you as soon as possible.

Sample DR auto-response



To avoid redundancy and multiple auto-response emails sent to the shopper, dealerships should consider removing auto-responders for DR deals submitted. Instead, allow the DR platform to send the auto response, then follow up with a Quality Response, unique to the shoppers inquiry and dealership's value proposition.



RESPOND TO DIGITAL RETAILING LEADS

Quality Response

A customized, quality response to a DR customer sets the stage for a seamless online to in-store experience. Best practices to include in each response, along with sample scripting, are listed below.

- **Validate and acknowledge the shopper's offer** submitted:
 - ❖ "To verify, you've made a 3-year, 10K miles/year lease offer at \$349/month with a price of \$28,000 and only \$3500 total drive off"
- **Give the shopper options** when making a counter-offer:
 - ❖ "We can keep the \$349 (includes tax) payment with \$3876 (only \$376 more down), and a price of \$28650 -or- 2. We can adjust the payment to \$376 (includes tax) with \$3500 down and a price of \$28650"
- **Offer Next Steps** that include options to continue the deal online or come into the dealership; allow the shopper to feel in control of their buying process.

Vehicle Protection

- ❖ "We see you have included / have interest in the <insert protection package>. We will make sure to go over that with you when you arrive"

Test Drive

- ❖ "I've confirmed the vehicle is available and will be ready for your test drive on <insert appointment time>"
- ❖ "You can schedule a test drive by contacting me directly or on our website. <insert link to VDP> "

Vehicle Reservation

- ❖ "We have received your vehicle reservation! We look forward to seeing you <insert appointment time>"

Credit Application

- ❖ "We can save you even more time in the store if you complete your secure credit application online here, OR you can come into the dealership to complete the paperwork"

- **Provide your contact information**



RESPOND TO DIGITAL RETAILING LEADS

Other Key Points

Other key points to remember when communicating with DR shoppers:

- Work the payment, not the price
- Differentiate your dealership on the experience and time saved, not just price
- Sell the car, not the appointment (resist temptation to ask the customer to “just come in”)
- Make it easy for the shopper to move forward. Discuss next steps and provide options

Using Templates



Templates are a helpful tool to use, but should always be edited to:

- address any specific questions the shopper has asked
- make the response customized for the dealership and its unique value proposition

RESPOND TO DIGITAL RETAILING LEADS

Sample Quality Response:

Jon,

Thank you so much for sending your offer using our new, streamlined approach to buying your next vehicle. The idea is to make sure the “not-so-fun parts” are completed at home so we can focus on the fun parts here - like getting you into your new car, fast!

To verify, you have offered \$26,500 for a 2018 Honda Accord, with \$2,500 down and 60-month financing, and you are trading in your 2014 Suburban that has a payoff amount of \$12,582. Based on this offer, the monthly payment is calculated at \$362. You’ve also indicated you would like to keep your monthly payments under \$350.

While we believe this Honda is competitively priced, we can offer a sale price of \$27,800, with two financing options to choose from:

- Option 1: \$2500 down with 66-month financing yields a payment of \$358/month
- Option 2: \$3,500 down with 60-month financing yields a payment of \$368/month

I see you have included All Weather Mats in your offer; We’ll make sure to go over the details with you.

NEXT STEPS:

I’ve confirmed your vehicle will be ready for a test drive on your requested appointment time of **Friday afternoon, April 12th at 3pm.**

After you choose your preferred financing option (above), you can even save more time by clicking [here](#) to complete the secure credit application online, from the comfort of your home. You can contact me via phone or text at 555-456-7890, anytime. I’m here to help!

Thanks so much for trying out our online shopping experience.

Rich Martino, Deal Concierge,
ROI Motors - Honda
direct: 555-456-7890 (mobile and text friendly)
richmartino@roimotorshonda.com



RESPOND TO DIGITAL RETAILING LEADS

Immediate Acknowledgement Contact

Although **not recommended**, should the dealership choose to send out an Immediate Acknowledgement Contact, *in addition to the DR auto response*, consider using the template below:

<insert client first name>

My name is *<insert name>* from *<insert Dealership Name>* and I will be assisting you with your vehicle purchase that you submitted on line.

I see that you have selected a *<insert year, make, model, trim, VIN>* online.

Please allow me the opportunity to review the details that you have submitted and locate the vehicle that you have chosen. I will be contacting you within one hour based on your preferred method of contact that you provided *<insert for lead form>* to confirm all of your deal details and answer any questions you may have.

I look forward to being your Point of Contact throughout the purchase journey here at *<insert Dealership Name>*

<Insert formal signature and contact information>

CRM RULES, TEMPLATES & WORKFLOWS

The dealership's **CRM Administrator** will need to establish CRM rules, templates and workflows to ensure a successful engagement with digital retailing shoppers.

Your Dealership's CRM

- Set up editable email **templates** for:
 - ✓ Quality Responses
- You may also consider setting up **templates** for:
 - ✓ After hours response
 - ✓ Appointment Reminder
 - ✓ Unsold follow-up
 - ✓ Long term follow-up



CRM RULES, TEMPLATES & WORKFLOWS

VinSolutions Customers

For VinSolutions customers, please reference the following tutorials in VinSolutions eAcademy for further instructions. *(From Connect, click the Training tab in the top right corner of the main screen and login to eAcademy > Available Training > Connect Admin Certification).*



- **Lesson 10** Admin - ILM/CRM Settings: Lead Assignment
- **Lesson 12** Admin - ILM/CRM Settings: Lead Settings (Automated & Manual Workflows, Bad Lead and Duplicate Lead Rules)
- **Lesson 13** Admin - ILM/CRM Settings – Templates - Email Stationary
- **Lesson 15** Admin: ILM/CRM Settings – Lead Source List – Dealer Hyperlinks – Customer Assignments

