

Leveraging Technology for Dealership Success

By Jennifer Schmidt, Charter Software, Inc.

In your dealership, it's very possible that you are selling more products that are based on the concept of using technology to access knowledge. For example, many farmers are using high-tech tools, and now many tractors are becoming standardly equipped with remote diagnostic software. In a recent series of articles, "Technology for Profit," by Currie Management Consultants, George Russell said, "The products you sell and service are more technologically sophisticated, which means that the way you sell and service them must also match that level of sophistication."

This means that a progressive equipment dealer, like progressive farmers, should be using technology to access knowledge. You own a wealth of information and knowledge about your customers such as history of their purchases and repairs that can be used to improve customer satisfaction. This data should be accessible through your business system and/or CRM (Customer Relationship Management) system. A built-in CRM omits the expense of buying and maintaining a separate system and eliminates concerns about integration with your data. By putting your customer data, sales, quoting, and internal communications at their fingertips, CRM systems allow your staff to be more prepared to respond to customer questions and will help them to foresee items they may be interested in purchasing or needing serviced.

At a Glance Information-the System Dashboard

In ASPEN's CRM, for instance, your sales team can view and track the life cycles of sales and prepare quotes. The system dashboard provides a drillable, high-level graphic representation of data that allows the user to quickly take action – directly from the dashboard. For example, sales management can track sales confidence level, revisions, and sales won and lost reasons; the service team will have ready access to open work orders and information that will help expedite

customer service; and the accounting team and management can view information such as who is past due, cash on hand, in the bank etc.

Internal Communication Tools Speed Service and Customer Satisfaction

Internal communications tools, such as the ability to send instant messages or assign tasks to dealership staff are an important part of a CRM, as these functions expedite your business communication and can enhance your customer experience. In ASPEN, for example, a user can send an instant message from most screens that will allow the recipient to link directly to the relevant record or report right from the IM, so they can readily access information without searching. George Russell said, "Many dealerships, especially large and/or multiple-location operations, struggle with internal communication. Using technology like instant messaging will not solve the entire problem, but with its ease and speed of use, it can minimize delays and enhance overall communications."

Managers will also use a CRM to assign and monitor the progress of the tasks they delegate. In some cases, tasks can be a part of Workflow, which is an automated task and transaction-creating process. As users complete their assigned task(s), they may continue the workflow by creating a follow-up task for themselves, another user or team. This is a great way to stay on top of processes in your dealership.

Mass Communications to Customers

E-mail and mass mail are powerful features of a CRM that help increase sales and service opportunities. Using the capabilities of the CRM to target and segment the customers you want to reach, such as by the type of unit they own, their demographic area, product warranty date, etc., allows dealers to customize e-mails to send to the desired customer base. These e-mails or any other types of mass communication such as a mailing are then logged in the customer records.

Users can also manually create and log communications for any contact they have with customers such as personal visits, mail sent, in-person visits, and phone calls, which will greatly assist the next person who comes in contact with that customer or prospective customer.

Take Advantage of Technology to Improve Your Business

If you do not currently have a way to perform these vital tasks, it's very possible that your competitor does! Take advantage of the technology available to you and take control of your business by leveraging your own data to increase sales, customer satisfaction and retention and improved workflow and communication at your dealership. ■

ASPEN's Built-In Tools Help Expedite Processes

Add Task

Task: Review Unit

Description: Unit No 16 - 2 Whl Drive Tractor

Assigned To: Dave

Memo: Mr. Giles would like more information on this tractor, please give him a call. Thanks!

Due Date: 11/30/2012

Monitor this task

OK

- Link to specific records from tasks and instant messages
- Delegate and monitor tasks
- Use broadcast instant messaging to minimize inter-office email
- Keep tabs on your dealership's pulse from the system dashboard
- Increase sales and service with targeted marketing

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