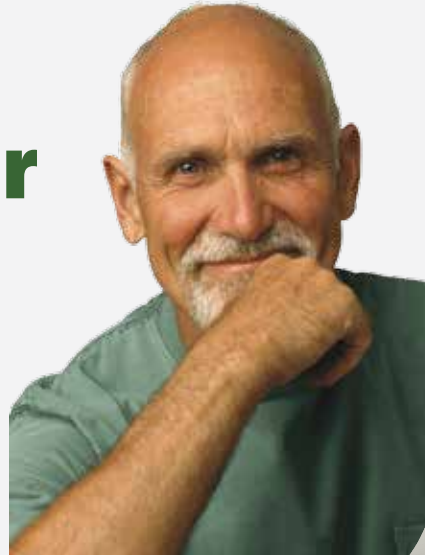


Smart Equipment Dealer's Guide

Leveraging Technology for Success

**Evaluating Your Use of
Your DMS**



Courtesy of Charter Software Inc.

chartersoftware.com

Smart Equipment Dealer's Guide to Evaluating Your Use of Your DMS

In most dealerships, employees tend to focus on their usual daily business transactions, potentially neglecting the management, marketing or communications capabilities that could be part of your dealership management software. These features, if learned and used effectively, can help you grow your business with minimal additional investment.

This guide will walk you through the necessary steps to assess and evaluate how effectively you are using the tools in your DMS, help determine if your staff needs additional training, if you need to purchase “add-ons” to the DMS or if you need to consider replacing your system.



Top Reasons that software users tend to use less than 30% of the system features:

- **Creatures of habit—people tend to only have time for the basics to get their job done.**
- **Business Requirements change, and business systems evolve.**

The main focus of using a DMS is generally to process daily transactions. The good intentions we all have of utilizing more of the system's management, marketing and communications capabilities often occur later than sooner. Reversing this trend can save you both time and money and help you grow your business—with minimal investment.



1. Are employees staying in their comfort zone?

To fully utilize the features in your DMS, some users may need to phase out their current way of doing things. Are they relying on e-mail or an external instant messaging system rather than one built into your DMS? Do your techs use a standalone service clock that requires hours to be manually entered rather than the clock built into the DMS or the DMS's mobile service application?

To get out of a rut, one often has to build a new road; create a new process that better utilizes the features in your DBS. Those features are there because other dealers use them, and it's very likely you can utilize them too.

George Russell, business consultant



2. Have your needs changed?

What may now be a need may not have been perceived as one previously. For example, if you recently added rental or mobile service to your offerings, you may not realize that the management tools you now need are already included in the system you have.

Another example is the trend toward mobile applications in the dealership. Dealers who may not have previously seen this as important may now want their employees to be able to access their DBS remotely using their smart phones, laptops or tablets.

What changes at your dealership might require new ways to use your business system? Have you added rental or mobile service to your offerings?



3. Designate a 'Power User' to research best practices

Do you have an employee who always wants to try new things?
Appoint this trail-blazer to research industry best practices by:

- Networking with other dealers at dealer meetings/conventions and/or “Dealer 20” groups
- Visiting online dealer forums and blogs
- Working with industry consultants
- Learning about any new software add-ons or new methods of using the DMS that will improve your processes

Trust your Power-User to find out if an “add-on” to your DMS will provide the functionality you need. What may initially cost a couple hundred dollars, could make or save you thousands!



4. Investigate Available Training

Find out what types of training your DMS provider offers to fit your schedule and budget. Release update webinars or “on-demand” videos may be free. Send your key personnel to user conferences to learn important features related to their department. Depending on your needs, you may find that customized web-based or on-site training to be more beneficial.

Employee software utilization is directly related to the amount of training. Additional training in weak areas can increase your return on investment in both the software and in your employees.



5. Make Downtime Work for You!

Be sure to also encourage your employees to make effective use of their downtime in slower periods to increase “off-season” profits. For example, classes on how to effectively use the DMS’ suggested ordering functions, or how to use the system to send promotional emails to customers who haven’t had their equipment serviced in over a year, etc., can immediately help to boost sales.

Filling your service queue in your slower season could be as simple as viewing a ten-minute instructional video on how to use your DMS to market your customers.



6. Determine if you need a new business system

Let's face it, some software is so outdated it won't ever be updated. There's no reason to stick with "your father's software" just because "that's how it's always been done." It's in your hands now to take the company forward!

If your software lacks the tools or training that you've determined are necessary, you may wish to consider a new business system. Knowing the tools you need puts you way ahead of the game! Dealers who know what they want are more able to narrow down their options, and you will feel more confident when asking questions in the demo process.

**Get the Smart Equipment Dealers Guide:
Important Considerations When Researching a DMS**
chartersoftware.com/know-the-right-stuff

