

# The Dealer Experience

Five Factors to Consider Before  
Every Technology Investment

## Table of Contents

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### VENDOR VS. STRATEGIC PARTNER

Choosing correctly between the two types of supplier can make all the difference. Just ask this dealership after encountering a category-four hurricane.

04

### CRAFTING THE PERFECT IMPLEMENTATION

Two dealerships wrote to us. What they say (in words and between the lines) reveal important insights into what made their installations ideal.

09

### FROM TRAINING TO LEARNING

How can you ensure your next technological investment is adopted by your staff? Providing them with an optimal learning experience (or three) is key.

13

### GETTING THE SUPPORT YOU NEED

Nearly everybody offers some form of customer support, but they're not all the same. Pick the wrong type, and minor issues could turn into major obstacles.

17

### CONSTANTLY ENSURING YOUR SUCCESS

Most dealerships only use a fraction of their system's capabilities. And without ongoing performance management, it could be holding them back.

21

# Intro

When your dealership needs solutions, there are a multitude of questions to answer. Many of them can be dizzyingly technical. And all too often, they trigger a landslide of specs that can overtake and bury non-technical considerations.

Some suppliers would rather leave it that way. But we know you deserve more. **We've seen how important non-technical considerations have been to the success of hundreds of dealerships.** As confirmation, our researchers have conducted interviews, evaluated case studies, crunched numbers and compiled data.

Keep this document on hand so they won't be lost again: **five industry-proven factors you can easily apply** to determine the success of every solution and supplier relationship.



# Vendor vs. Strategic Partner

As business operations have become increasingly complicated, there's no denying the importance of an effective dealership management system (DMS). But choosing a technology provider can be confusing — and the wrong choice can prove disastrous.

Much of the confusion comes from the difficulty in discerning between vendors and strategic partners. To illustrate the difference, let's examine a recent, real-world example.

## Hurricane Laura Disrupts a Dealership

### THE EVENT

In late August of 2020, Hurricane Laura began as a tropical depression in the Atlantic Ocean near the U.S. Virgin Islands. Over the next several days, it intensified while damaging Puerto Rico, the Dominican Republic, Haiti and Cuba before striking the southwest Louisiana coast with the force of a category-four hurricane.

Extreme rainfall and winds up to 150 mph hit the U.S. and caused parts of Arkansas, Florida, Louisiana,

Mississippi and Texas to declare a state of emergency. Along its path, the hurricane tore down power lines and affected numerous homes and businesses, including Granger Chevrolet in West Orange, Texas.

### THE DAMAGE

Granger Chevrolet was relatively lucky — the hurricane had not caused it major structural damage. However, the dealership did lose connectivity to both its network routers as well as to the on-site adaptive security appliance (ASA) providing remote access to its DMS. As a result, the network was down, the DMS was inaccessible, nobody could communicate and business was at a standstill.

## Different Views of the Same Problem

What would be the difference if the dealership had purchased its DMS from a vendor versus a strategic partner? It helps to compare their perspectives side by side.

## VENDOR PERSPECTIVE

The vendor is focused on the sale of the product or service.



The vendor's responsibility is to meet the dealer's immediate need.



When the sale is complete, the vendor relationship is completed.



The vendor is compensated upfront, so is predisposed to make the greatest profit at the time of sale.



## STRATEGIC PARTNER PERSPECTIVE

The strategic partner is focused on the long-term success of both parties in the relationship.

The strategic partner's responsibility is to collaborate with the dealer, understand their growing and changing needs, and consider long-term goals — sometimes at the expense of making a sale in the short term.

The strategic partner relationship remains ongoing beyond the sale.

The strategic partner is compensated over the length of the relationship, so is predisposed to demonstrate long-term value by providing consultative options to reduce dealer cost or save money over time.

## The Results

Given the contrast in vendor and strategic partner perspectives, we can expect that the resultant business outcomes at Granger Chevrolet in the aftermath of Hurricane Laura would have differed dramatically:

Had Granger Chevrolet's network and DMS been provided by a vendor, it's doubtful the vendor would have felt an obligation to do anything further — the vendor's equipment or service was not at fault; they had fulfilled the terms of the contract and the dealer's connectivity issue would fall outside the vendor's responsibility.

A vendor may have seen this as an opportunity to sell replacement products or additional services. Meanwhile, Granger would have had to wait for power and internet service to be restored before they could resume business. In hurricane-torn

West Orange, Texas, that wait would have cost them more than a week of lost business.

Since Granger Chevrolet's technology came from strategic partner CDK Global, the focus was on immediate help and investment in the long-term relationship. CDK quickly configured a temporary HRAS account for secure direct connection to CDK's data center. This successfully restored Granger's access to its DMS so operations didn't have to wait a week or even a full day to resume. They were back up and running in about one hour.

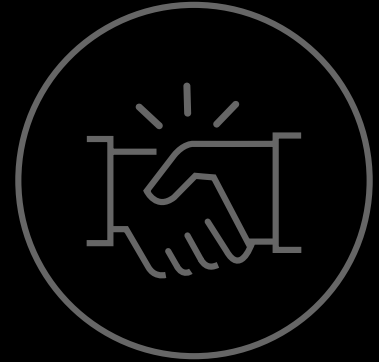
## More Than Just Hurricane Protection

Even if your dealership is never hit by a category-four hurricane, other scenarios can bring out additional differences between vendors and strategic partners:

SCENARIO	VENDOR RESPONSE	STRATEGIC PARTNER RESPONSE
<p><b>Dealer system goes down.</b></p>	<p>The vendor has no incentive to respond unless it's to potentially sell additional products and services.</p>	<p>The strategic partner is invested in the long-term success of the dealer and will often place a greater emphasis on resources that make them more available — so they can respond quickly and act as a true extension of the business.</p> <p>Note: After Hurricane Laura, CDK resources had Granger Chevrolet back up and running in an hour.</p>
<p><b>Dealer experiences a financial crunch.</b></p>	<p>The vendor has incentive to charge full price and is typically not interested in helping the customer make decisions that will result in spending less money or reducing costs over time.</p>	<p>The strategic partner may try to help by providing discounts when and where applicable. They may also offer guidance on cost-cutting decisions that will help the business through tough times, as well as over the length of the relationship.</p> <p>Note: During the pandemic, CDK cut its prices on several offerings from 25% to 100%.</p>
<p><b>Dealer needs a digital store implemented quickly to stay afloat.</b></p>	<p>Due to the nature of their short-term approach, the vendor is not interested in looking at the big picture relationship and how a dealer may grow and change over time. Their only incentive is to capitalize on demand today and even charge a premium.</p>	<p>The strategic partner is aligned with their customer's business and sees the mutual benefits of their relationship. They can take a more consultative approach and even offer discounted solutions if it means ensuring long-term success.</p> <p>Note: During the pandemic, CDK set up digital stores for its dealers for free.</p>
<p><b>Dealer wants to protect consumer data.</b></p>	<p>The vendor has incentive to profit by selling data.</p>	<p>The strategic partner is a protector of dealer data and relationships.</p>

## How Can You Tell if Your Supplier Is a Vendor or a Strategic Partner?

Consider how they stack up against these questions:



- 1 Are they “in it for the minute” or are they willing to withstand the ups and downs associated with a long-term relationship — seeing the overall benefit and not just the immediate win?
- 2 Do they have the history and industry experience to provide the resources and knowledge necessary for extended success, especially when the chips are down?
- 3 Are they truly and proactively aligned with your business, and act as an extension of your dealership committed to a shared vision?
- 4 Are they an open company that builds the type of trust that only comes with true transparency (sharing information, listening)?
- 5 Do they have the expertise to guide you through the disruptors to the auto industry such as electric vehicles, online retailing, and the changing relationship between dealer and customer as well as between dealer and supplier?
- 6 Can they lean in on behalf of the dealer regarding new regulations and policies, and keep their eyes on the road ahead so you’re free to focus on your customers?

## Seeing the Bigger Picture

One more factor that separates the vendor from the strategic partner is a broader perspective of the industry. This benefits the dealer because while the vendor is limited to selling their own brand of solutions and services, the strategic partner can look beyond its own offerings to survey the landscape before identifying exactly the right solution.

CDK may even surpass other strategic partners in this regard — it not only surveys the landscape, but is itself moving toward open and universal platforms and solutions through the support and development of:



**elead**

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The most highly  
awarded CRM  
in the industry



**ROADSTER**

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The best-in-class  
automotive digital  
sales platform



**neuron**

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Next-generation  
intelligence engine that  
turns data into insights



**Salty.**

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Embedded Insurance<sup>®</sup>  
that brings value  
into sales



**CarSource**

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The largest  
digital vehicle  
wholesale platform

**FORTELLIS**

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The industry's first  
open marketplace  
for apps and APIs

In addition to helping CDK provide dealers with greater freedom and flexibility, this open and universal technology does one thing more: it is an investment in the automotive retail industry that will strengthen, unify and empower every member to serve our consumers better.





# Crafting the Perfect Implementation

Change is seldom easy. It's human nature to prefer the comfort of old routines over new ones, which makes implementing a new system challenging for everyone at the dealership. Increasing the challenge further is the sheer number of details involved in a successful installation, leading to results that range wildly from one extreme to the other: some installs are rocky and end in dissatisfaction, while others go so smoothly that they take your breath away, especially if you've experienced the rocky variety first.

This all leads to the question: Is a perfect implementation possible every time — or are there too many human and logistical factors to calculate, making it more a matter of luck? Two recent examples may provide us with answers.

## Recommendation From Premier Automotive

While all service providers will say they perform great implementations, it's the dealership perspective that really counts. Bill Madden of CDK Global, after

receiving a request for a reference from a potential partner, contacted Wayne Skinner, VP of Operations at Premier Automotive. Skinner's recommendation was enthusiastic:

*"Bill, I cannot praise you and your team enough. I have been through eight installs with various DMS providers and this has been the most seamless of them all. If any dealer group has questions have them feel free to call me."*

Madden's response included hints to CDK's success:

*"Thank you for the kind words. It is amazing what can happen if the prework, focus and commitments of both customer and [strategic partner] are driven by the same goals. I am blessed with a great team that worked together with your organization to reduce impact to employees, customers, and revenue generation. Please call if I can ever assist your efforts."*

## Unsolicited Praise From Another Dealership

More clues can be found in a letter to CDK from the Systems Manager at a second dealer group:

*“I am writing you because recently we have made two implementations with Carlos Augusto Rodriguez [Business Solutions Consultant at CDK] on his own, and they have both been outstanding ...*

*He made sure to show us how to maximize our full process ... He gave the Techs a sense of urgency with the estimates and it made them hungry to produce more, showing them how they had more visibility now over the repair ... He made sure that everything was taken care of and made us feel calm and under control in an opening. As you know, openings are stressful and full of tiny details that need to be corrected on the go, and I have to say that he made sure to give us peace of mind during such time. We consider Carlos a key element in our team.*

*I am so grateful for his work and the passion that he has ... even though he doesn't directly work for us, he makes sure to treat us like teammates and adds great value to our operation.”*

## Analyzing What Went Right (and What Can Go Wrong)

Going over these dealer letters with a magnifying glass, we can isolate several specific factors for implementation success.

### 1. SUPPLIER AS STRATEGIC PARTNER

As you read in the previous chapter, a service provider who relates to the dealer as a vendor is primarily focused on the immediate sale, while a strategic partner focuses on the long-term and treats the dealership with the care of an ongoing relationship.

Building a close partnership is one of the most important factors contributing to a successful implementation; and in both of the above dealer examples, we can see how the strategic partner relationship contributes to a positive experience. Madden refers to CDK's “focus and commitment ... driven by the same goals,” while the Systems Manager shows appreciation for how the CDK consultant “made us feel calm and under control,” providing “peace of mind,” and acting as “a key element in our team” who “makes sure to treat us like teammates.”

### 2. STAFF INCLUSION

Diving deeper into the “teammates” comment above: one can't underestimate the importance of including employees in the process — even before the physical installation has begun. If expectations aren't set and benefits fully explained beforehand, the team can only guess what went into the decision-making process. Without their buy-in, staff is left feeling strong-armed into adapting to a new system they neither wanted nor asked for.

In the second dealership example, the CDK consultant includes staff on-site by making “sure to show us how

to maximize our full process.” Prior to that, CDK reached out to dealership management with the tools to help them ensure staff was on board. This is a critical piece of the puzzle many providers overlook.

### **3. DEALER PREPARATION**

Part of “Staff Inclusion” worthy of specific attention is preparing staff with instructions on operating the new system. But this must be provided with a careful attention to balance: too detailed and it becomes daunting and complicated; too light and it places the staff in a frustrating spot — they’ve lost a tool they knew how to use and been handed a tool they don’t know how to operate. Whether the new tool is objectively better than the old one is beside the point.

Once again, the CDK consultant came through. The second dealership tells us how he walked employees through the system and got them excited by demonstrating capabilities they didn’t have before: “He gave the Techs a sense of urgency with the estimates and it made them hungry to produce more, showing them how they had more visibility now over the repair.” This built on CDK’s virtual training which preceded him on the scene, providing pre- and post-assessments to determine each staff member’s training needs.

### **4. MINIMIZING DISRUPTION**

This one seems obvious: The longer an installation takes, the greater the disruption to a dealership’s business. To really feel the enormity of the issue, consider the timespan between the shutdown of an old DMS and the startup of a new one — and all the manual processes that have to take place during that time. That’s a huge inconvenience, and it’s up to the service provider to keep it to a minimum in order to maintain a positive dealer experience.

However, implementation can’t be rushed either (see “Staff Preparation” and “Dealer Inclusion” above). The right partner knows how to strike the balance, and as we see in the Premier example, CDK did it right. When

Madden credits “a great team working together to reduce impact to employees, customers, and revenue generation,” this is exactly what he’s talking about — plus one more element:

## 5. COORDINATION

There are so many moving parts to the implementation process. Lack of coordination among them can lead to a host of issues ranging from dealer confusion over the process, to not knowing which supplier contact to call, to accidentally missing portions of the install.

In our Premier Automotive example, when Skinner says “I have been through eight installs with various DMS providers and this has been the most seamless of them all,” that’s a telling statement. Coordination is where so many service providers’ implementations fall apart. The key to CDK’s coordination is our standard implementation process.

## Raising The Bar On Precision

The standard implementation process turns every install into a science. Its goal is to simplify and standardize every element so installation is optimal, reliable and reproducible across multiple storefronts and locations.

CDK’s SureStart approach accomplishes this by:

- Consolidating roles to increase efficiency, improve end-to-end ownership and simplify communication
- Proactively aligning expectations through Service Level Agreements (SLAs) to establish deadlines and reduce surprises or delays
- Establishing escalation paths at every touchpoint to keep jobs on track throughout the process
- Utilizing a dealer-facing status-tracking tool to encourage greater involvement and a closer partnership between dealership and strategic partner
- Ensuring rigorous adherence to a carefully designed five-step process which pays equal attention to dealer site readiness and workflow

The total benefit of CDK’s standard implementation process is undeniable: it addresses every one of the factors above so users are better prepared. Resources are used more efficiently. Roles and responsibilities are clearly defined. Relationships are strengthened. Go-live is smoother. And dealers receive a quicker return on investment. The end result is greater dealer satisfaction — with implementations that are as close to perfect as possible, every single time.





# From Training to Learning

Dealer satisfaction with the implementation of any new technology depends on many factors. But one that may be most critical in the long term is this: Learning. And it's an area that's overlooked by many providers.

To clarify, learning is not the same as training. The latter word can be applied to any educational offering. But the dirty little industry secret is that not all training is equally effective at providing the optimal conditions in which students can learn. A big part of this comes down to timing.

## Ready for Day One

Imagine if a new technology product suddenly appeared on your desk. You didn't know how to use it, but the system you were using up to this point had been taken away. Would you feel angry, disregarded or powerless?

That's exactly the experience many staff members have at dealerships after migrating to a new system. As mentioned in the last chapter, associates often don't know why the new system was chosen by management, and probably weren't offered learning opportunities until after the technology was installed.

But by then, it's too late — because that first day counts.

The first experience someone has with a new piece of technology establishes their relationship with it from that day forward. If the first experience is positive, they are likely to maintain a positive impression of that product. Alternately, if the first experience is negative, they will continue to approach the product with a level of fear and discomfort that no amount of subsequent learning may be able to overcome.

To avoid a negative first experience, the first step is helping staff members learn how to use the technology before the first day of on-site implementation.

## Foundation Over Perfection

That brings us to the next logical question — how much material can be reasonably covered in advance of installation? To put it in perspective, let's use another example: a teen's first car.

Nobody can just open the door of their first car, climb inside and innately know how to drive it

well. That's why the classroom component of high school Drivers' Ed teaches the rules of the road and the car's basic functions before anyone gets behind the wheel.

After that, reasonable expectations are set. When student drivers get into their cars for the first time, they aren't expected to reenact "The Fast and the Furious." Similarly, an associate's first experience with new technology doesn't have to be perfect. It can't be: the associate has built up years of muscle memory using the previous system, and their skill with the new system will need time to catch up. Speed and mastery will grow with practice.

What's important is that on installation day, they have the foundational knowledge to **ensure their first experience will be a positive one.** And no more information than that. Too much and it could become overwhelming — and that's before adding in The Consumer Factor.

Consumers don't stop showing up just because it's time for implementation; they keep walking through the door to shop or get service. This is no time for staff members to learn new software. Everyone at the dealership needs to know precisely enough about the new system to turn the ignition, hit the gas and move forward, even with the added pressure of a consumer watching from the other side of the desk.

*"Learned new information  
that I can immediately  
apply to my workload."*

R. DIAZ  
BMW OF BEAUMONT

## Encouraging Commitment

The third factor of successful learning depends on the commitment of the dealership team. To help encourage support at every level, CDK Global has become the first in the industry to create a role specifically for the purpose: *the Learning Coordinator*.

Acting as a conduit between our Implementation Manager and the dealer, the Learning Coordinator meets with dealership management to discover their learning needs. Then they work with associates at the dealership who act as Learning Advocates and champion the program among employees. Through the Learning Advocates, the Coordinator receives preliminary information about class attendance and shares detailed learning plans that meet the dealership's needs.

Once the session begins, the Learning Coordinator becomes the direct contact who class members go to for answers to their individual questions. This may lead to individualized instruction tailored to their preferred learning mode. Here's why that's important —

### One kind of learning isn't enough.

Current understanding within the education field is that not everybody learns the same way. Some people absorb information best through their sense of sight (visual learning). Others need to hear it (auditory learning). A third group needs a physical component (kinesthetic learning). These are three distinct educational languages; and if a program only teaches in one mode, people in the other two groups may get left behind.



Structure is the solution. To ensure everyone on the dealership team is equally served, CDK is leading the way by employing a structure of layered learning. All our learning programs, including implementation, are designed to maintain a balance among learning languages so information is conveyed —

- **Visually:** through onscreen words and images
- **Auditorily:** through engaging narration
- **Kinesthetically:** through physical interaction (e.g., clicking, dragging and simulation)

If a class member finds they need further assistance, CDK instructors are quick to adapt material to the learning language that suits the individual student best.

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*“The instructor took time to personalize the lesson to what I needed to know. Great use of my time.”*

MELISSA JACOBS | MORRIE'S AUTOMOTIVE GROUP

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## Motivation and Profits

To demonstrate how profoundly this attention to learning can affect dealer satisfaction, let's return to our earlier example of the dealer associate on day one. They've had an optimal learning experience as described above, so:



- 1 When the technology is installed, their first experience is positive.
- 2 This motivates them to learn more.
- 3 They take advantage of more of its capabilities.
- 4 Eventually, they become a master of the new technology.
- 5 Their performance becomes faster, more efficient, and more profitable for your business.

Let's take this further: Multiply this instance by all the employees at your dealership, whether they're a handful or more than a hundred. That's an **entire workforce providing maximum return on your investment**, all of them working smarter and improving your bottom line.

Yes, there are other factors that contribute to a successful implementation. But long after the process is over, it's the productivity of your employees that most determines dealer satisfaction. And that can be directly traced to your provider's dedication to every aspect of learning — so everyone on your team is equipped with the skills to be successful.





# Getting the Support You Need

It's three weeks after your new system has been installed, and your staff keeps running into issues. These may be so small that they were nearly invisible at the outset, like metaphorical carpet tacks scattered over blacktop. But if you can't clear them out of your path quickly, they could slow your operations down to a crawl — or stop you in your tracks completely.

That's where Support comes in. How well your supplier provides it can have a major impact on your business.

## Taking a Test Drive

Let's focus on one issue as an example. After weeks of using the system, there's a discovery in Accounting: transactions have been posting to the wrong accounts. This would feel like a frustrating step backward to a dealer, since the primary motivators for buying a new system are to improve speed and efficiency — goals that seem further away when you're sorting out all those misplaced transactions.

How could Support help you here? By preventing it from happening in the first place.

As we've seen in the prior chapter, staff education can head off many potential issues. And this specific Accounting issue is so common that CDK Global has added a special learning module designed to address it.

This module, called On-Box Verification, gives the dealership team the opportunity to test-drive the new system before launch: Staff members are asked to bring several deals from their previous system (usually five from Parts and five ROs). These deals are then recreated in the CDK system and followed all the way through to Accounting. In this way, issues can be identified and adjustments made at the setup stage, instead of being discovered weeks later.

## The Need for Ongoing Support

In an ideal world, all issues could be addressed preventatively before launch. But as we've discussed earlier, attempting to cover every possibility and function would overwhelm your staff with information. That's why ongoing support is so important.

There's just one catch: Not all ongoing support is equally effective. In considering an option for your dealership, hold it up to these three criteria to determine whether it:

- 1 Enables the dealer to reach the supplier easily
- 2 Delivers the dealer's information to the Support agent quickly
- 3 Resolves the dealer's issue with speed and accuracy

## Determining Which Type Is Best

For some industries, self-guided online menus are perfectly fine at providing simple answers (see Amazon): they're easy to access, and resolutions are as quick as you can click. Dealer technology questions, however, are seldom as simple. Suppliers following this model end up sending you through menu after menu — leaving you feeling lost in a carnival hall of mirrors.

Email is another support option offered by some suppliers. And while it may seem convenient in terms of access and routing, it contains a hidden drawback: the miscommunication that often springs from the written word. We've all seen emails interpreted by the recipient differently than the sender intended. In a support context, the resultant back-and-forth of emails needed to clarify both the problem and solution can not only become exhausting, but may lead to lengthy resolution times.

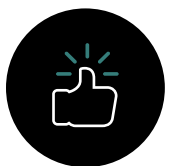
Live Call Support, as retro an option as it may seem, just might be the dark horse who wins this race. Let's examine the reasons behind this.

## Voice Can Be the Most Productive

Consider the advantages you gain by speaking with a person in real time:

- Reassurance that both parties are being listened to and understood
- Clearer communication by keeping vocal inflections intact
- Ability to ask questions and receive replies without delays

That level of directness and responsiveness can be hard to beat. This was confirmed when CDK Customer Care shifted to Live Call Support and conducted surveys to track dealer response:



**75%**

of dealers agreed that conducting interactions over the phone made it easier for them to explain issues — and for agents to understand and resolve them more quickly.

*“The last few times I’ve had to deal with Support, the Techs were amazing. Thank you for all the help I received.”*

**CDK CUSTOMER  
TESTIMONIAL**

## Ease of Access Remains Essential

As powerful as voice communication has proven to be, elaborate phone menu systems and long caller hold times can easily erode its benefits. Suppliers offering this option cannot ignore the first element of effective Support: **easy access**.

To address this, CDK evaluated caller hold times and the phone menu system. The results:

- Hold times were slashed to under one minute
- Phone routing was simplified and entire phone trees eliminated
- Dealers appreciated the difference — **61% agree the streamlined system made it easier to contact support**

*“This was the quickest, most professional and best service I have ever had from CDK. This call system works very well.”*

CDK CUSTOMER  
TESTIMONIAL

## Comprehension and Training Are Also Key

Once you get beyond the benefits of easy access to voice support, there are questions about the people answering these calls. How quickly can they comprehend issues, and how well prepared are they to resolve them?

CDK addressed these by instituting a number of training initiatives, which research credited for making a positive impact across the board. Of dealers surveyed:

**78%**

reported improvement  
in professionalism

**79%**

reported improvement  
in knowledge

**79%**

reported improvement  
in focus

**76%**

reported improvement  
in follow-up

**81%**

reported improvement  
in resolution time



*“Everyone I have talked to is very pleasant and knowledgeable. I don’t dread asking for help using CDK!”*

CDK CUSTOMER TESTIMONIAL

## Going Deeper Than a Single Department

While the numbers above are persuasive, we’ve saved two of our most compelling results for last:



**93%**

Customer Effort Score



**83%**

Cases resolved within 24 hours

All of this suggests the optimal Technical Support formula that dealerships should seek out is the one CDK has formulated: (1) provide streamlined access to (2) Live Call Support (3) staffed by agents who have been carefully trained to understand and resolve issues effectively. But there’s more to the story.

The call agents at CDK receiving these high satisfaction scores aren’t in a department called Support; they have another name: Customer Care. This isn’t an accident — it pinpoints a larger difference that sets CDK apart from others in the dealership technology field.

Support isn’t the role of a single department: it’s our culture, and it permeates **every level of our organization**. Whether you need equipment repaired, instructions explained or billing corrected, there’s always somebody to take ownership of the issue and help you reach a timely resolution. And after three weeks, three months or three years of working with CDK, that’s a distinction we think you will appreciate.



# Constantly Ensuring Your Success

Who's watching over your business to make sure you're getting the most from your system, and seeing to it you're on the right path? This might not be a function every dealer expects from its solutions provider, but it should be.

Most suppliers will provide you with some form of support after installation of your system, though as discussed previously, they are not all the same. The better ones will have a single contact to reach out to when you need help: one phone number to call when you have an issue with your bill or a question to be resolved. That customer-care person — called a Success Manager at CDK Global — is responsible for seeing your issue to its most satisfactory conclusion.

That's what is called reactive assistance. But the best kind of performance management process goes beyond that to also provide proactive assistance. And if your dealership were in the same situation as Granger Chevrolet, that's what you would want your supplier to deliver.

## Providing Proactive Assistance

When a natural disaster occurs, your Success Manager should be doing more than waiting for their phone to ring so they can react. They should

be proactively monitoring your dealership and doing everything possible to make sure you're able to do business.

Of course, this is an extreme example. Even under circumstances that present less of a crisis situation, your Success Manager should be looking for opportunities to help your business move forward. At CDK, that includes performing ongoing check-ins with dealerships, and being sensitive to changes in:

### UTILIZATION

Through their Utilization dashboard, CDK Success Managers can keep tabs on which of about a dozen applications each dealer is using — and how effectively they're being used. They identify which tools aren't being utilized. And they keep a watchful eye on opportunities for:

#### Revenue Generation

This may include checking whether Parts Pricing is as high as it should be based on market and demand.

#### Cost Savings

This may include reviewing parts on Special Order to determine the percentage that's sitting in the bin and costing the dealer money.

## Performance

Consulting their Performance dashboard, CDK Success Managers review critical financials to determine how the dealership is doing year over year, and to evaluate how the various departments are performing. Most importantly, they identify areas that are underperforming so they can be addressed and make your dealership more profitable.

Additionally, Success Managers at CDK can compare your dealership's performance with comparable dealer metrics sorted by size, region and OEM. That's an advantage only we can offer, based on the sheer scale of dealership data CDK analyzes daily. And all utilization and performance data are updated every 24 hours, to facilitate the most informed decision-making available.

## Making a Plan

Let's say an opportunity has been identified, either reactively or proactively. Next, it's time for the CDK Success Manager to work with the dealer on formulating a plan. Exactly what kind of plan depends on the needs of the specific dealer, and may involve one or more of the following:

- **Learning classes** — hundreds of on-demand courses are available through CDK University
- **Relevant webinars** — dozens of product-focused presentations are hosted each month
- **Specialist attention** — experts on our entire portfolio of solutions are on call

When a specialist is needed, the type that's contacted most frequently is a CDK Performance Manager. Let's look closer at what they bring to the performance management process.

## Calling In the Specialists

The Performance Manager has the tools to look more deeply into many kinds of dealer questions and resolve them effectively. So when the Success Manager has an active or proactive opportunity that could use their help, that's when the Performance Managers go to work. And like

Success Managers, Performance Managers will also reach out to dealers running CDK Drive and certain other solutions — particularly when monitoring tools indicate there's cause for further examination within:

### **SERVICE UTILIZATION**

Performance Managers can compare the dealership against standards for appointment, reception, inspection, VIR, lane and closing rate. They can view multiple dealer locations in a group, all in one place; take deep dives into Service department sales, labor, parts, and parts wholesale business; and identify the services that are the most recommended — and the most declined.

### **KEY PERFORMANCE INDICATORS**

Want to know how each of your Service Advisors is performing — who's doing well and who needs the most help? Performance Managers can tell you. They can drill down into new and used car sales, current vs. previous sales volume, gross profits and average per-car sales. Parts, Service, Sales and Accounting all receive their thorough consideration.

## **Taking Action and Following Through**

After carrying the Success Team's initial diagnosis through to a more detailed analysis of your dealership, the Performance Manager can provide you with a thorough plan of action. But even then, the performance management process isn't over.

You can expect follow-up from your CDK Success Manager or Performance Manager at a frequency that's customized to the precise needs of your business. It could be weekly, monthly or quarterly: whatever it takes to make your dealership its most successful.

Can every technology supplier deliver this level of ongoing performance management? Unfortunately, no; and the few who come close may require you to pay additional fees. But at CDK, **we see it as essential.** It's included — not extra, and evidence of the successful long-term relationships we look forward to building with you from day one.



## Your Dealership Deserves It All

As you've seen through this whole e-book, the right technology supplier for your dealership:



Shares  
your goals



Implements  
smoothly



Educates your  
team effectively



Supports  
you reliably



Manages your  
ongoing performance

At CDK, we are committed to being that partner for you. And we thank the dealers who have kindly lent their voices and stories to this series: **Premier Automotive, Granger Chevrolet, Morrie's Automotive Group and BMW of Beaumont.**



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