

YOUR AUTOMOTIVE CRM CHECKLIST

One of the most common mistakes buyers make when evaluating CRM software is the failure to ask the right questions, which makes it difficult to develop an apples-to-apples comparison of systems.

Without a solid comparison, buyers are more susceptible to purchase a complicated system that doesn't actually meet the organization's needs or else they end up with an off the shelf tool that only offers surface level functionality.

Building your automotive CRM buyer's checklist will save you time when it comes to learning what you need during demonstrations.

To kickstart the process, here's a basic list of questions to consider.



- Why are we investing in a different CRM?
- What is the main challenge with our current system?
- What operational challenges do we need to solve?
- What features do our sales team want in a CRM?
- How much customer data do we have and what condition is it in?
- What information do we need to collect for actionable insights? How is it gathered?
- What processes do we lack that would improve the customer's experience?
- How do our customers want us to improve in the way we communicate?
- How long does implementation take?
- Does the CRM integrate with tools we already use?
- Is data easily imported/exported?
- What mobile functionality is available for our employees/ customers?
- What texting capabilities are offered and how are they tracked in the customer record?
- How is video integrated into communications? Into the customer record?
- What digital retail options exist?
- Is it possible to easily and quickly segment customer lists for marketing campaigns?
- Is online shopping behavior tracked in the CRM?
- Are both sales and service data and transactions tracked in the customer record?
- Is it easy to customize the system and workflows to support our business model?
- What types of reports/dashboards are available and can we customize to our needs?
- What are my training and long-term support options?
- Can you provide a connected, modern online-to-in-store shopping experience?