

Advanced Lead Handling

Like a Rockstar

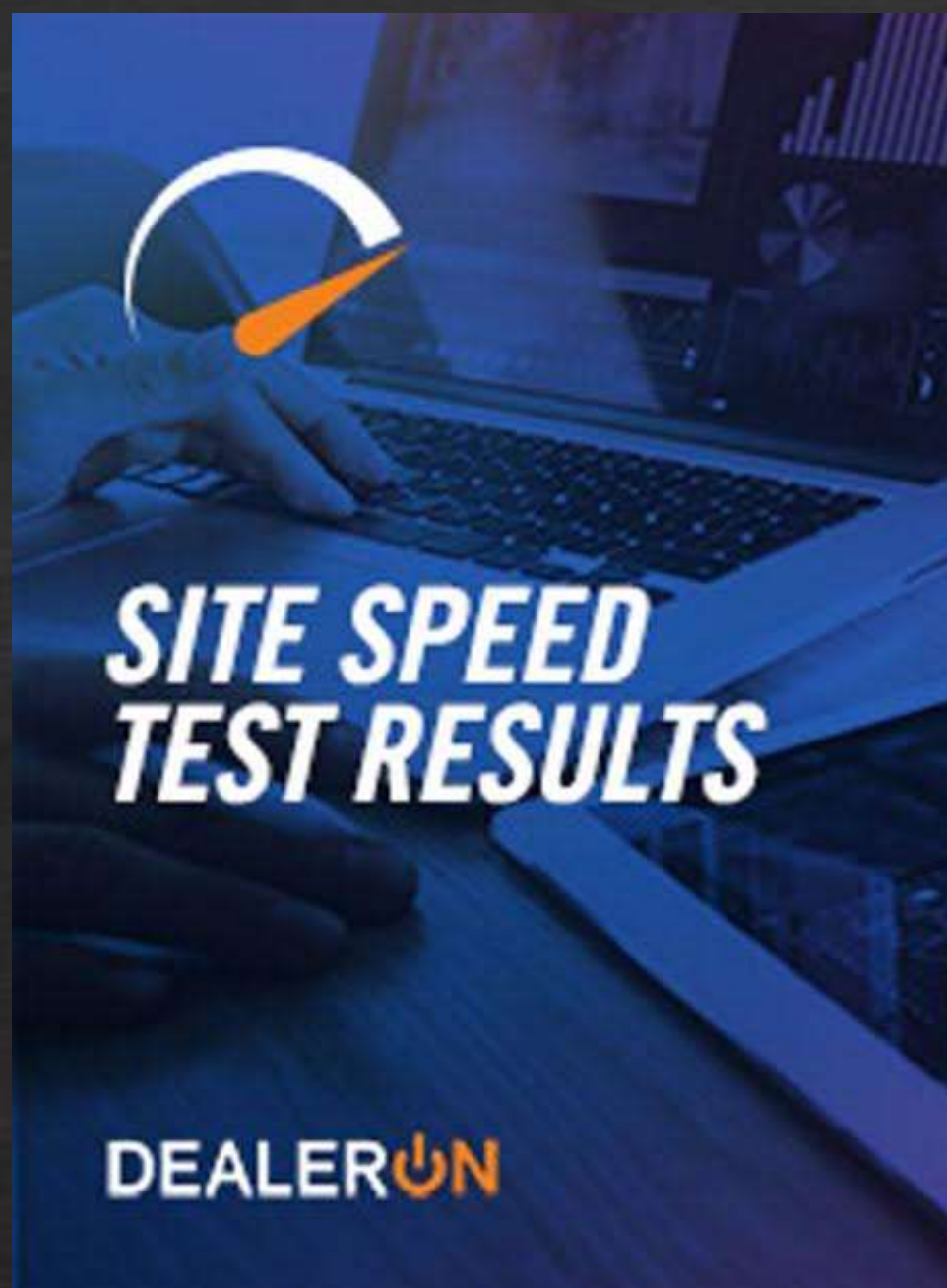


## About DealerOn

- Digital Dealer Website Excellence Award Overall Winner  
✓ An Unprecedented 6 Years In A Row!
- DrivingSales Top Rated Website Provider 2011 thru 2015
- Two time AWA award winner
- Google AdWords Certified Partner
- More Dataium Monthly ASI Winners than all others combined
- DealerOn's website customers have an average documented lead increase of 200%







## Losing traffic to a **slow** mobile site?

Get a **Mobile Site Speed Test** after the webinar!

**Customized** test includes:

- Page Load Time
- Average visitor loss
- Easy-to-read graphics



Say Hello To...



**Bobbie Herron**

CEO of Herself (Well -Almost)

PartnerWithBobbie@Gmail.com

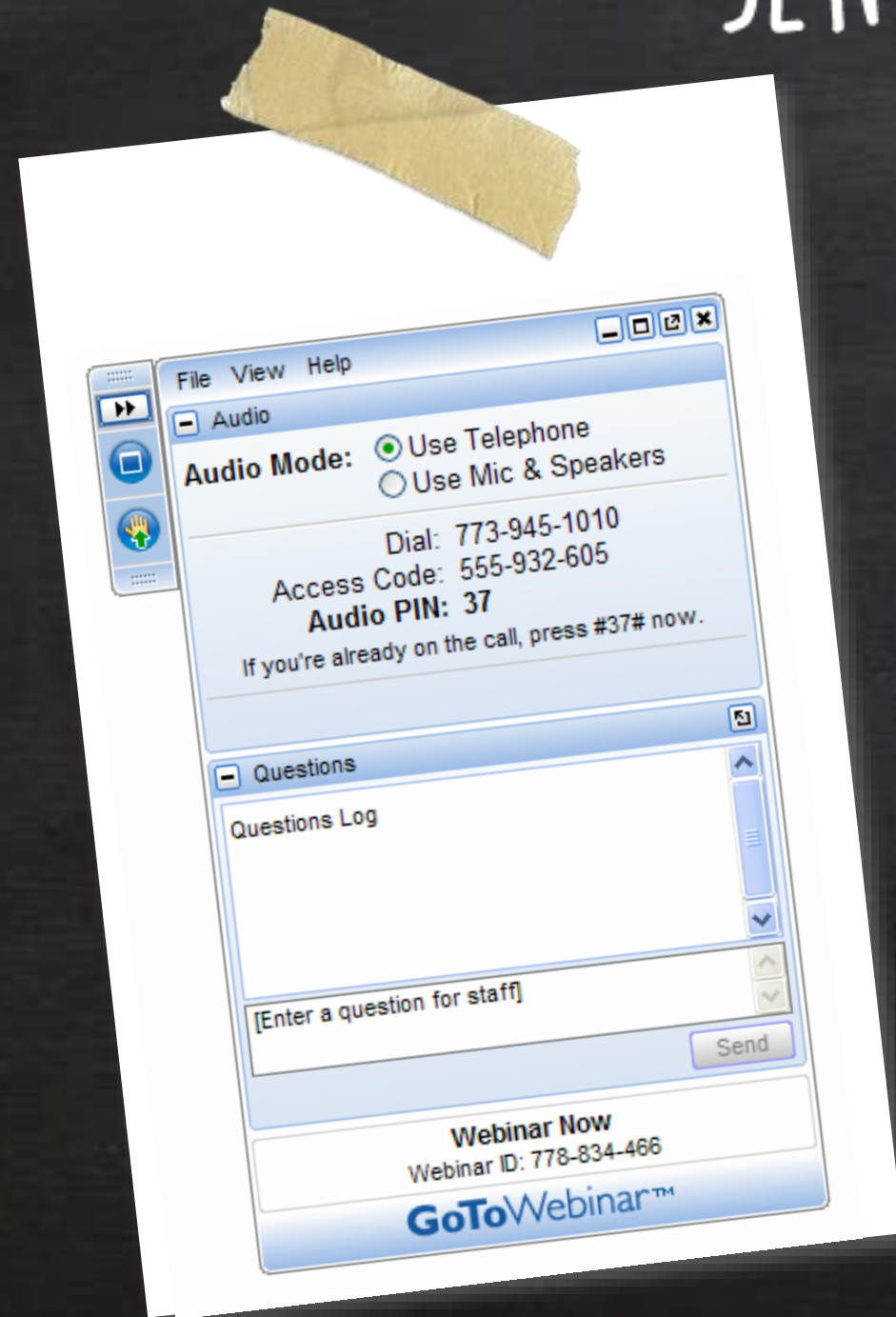
989.672.9945

@signontheline





# SEND IN YOUR QUESTIONS



- If you have questions during the presentation, please submit them using the “Questions” feature
- Questions will be answered at the end of the webinar
- A link to the recorded webinar will be emailed to you within 24 hours and will also be posted on [DealerOn.com/webinar](http://DealerOn.com/webinar) as an On-Demand Webinar

# PRIZE ALERT

One Month of Weekly  
One-on-One Virtual BDC  
Consulting  
With Bobbie Herron

\$5,000 Value

After the presentation, be the first to answer  
the giveaway question correctly to win this awesome prize!



## AFTER THE SHOW



After the webinar, please fill out our short survey  
and let us know what YOU thought of today's presentation!

## Tweet Much?

@Dealeron

@ElianaRaggio

#dealeronwebby

@SignOnTheLine



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# OBJECTIVES

- \* BDC Staffing and Scheduling for Success
- \* Process Gets Personal - When You Create It
- \* Creating Engagement through Contact
- \* Video Engagement and Texting Compliance
- \* Time for the Giveaway - Stick Around!
- \* Question & Answer Session (The Best Part)



Perception is Reality

Seriously. Check Your Mindset

“Leads” Are People Too





# POLL QUESTION





# Personalize Your Process

## The Small Things Matter

### CRM Setup - Custom is Key

- Plug and Play is NOT Ok
- Clean it Up and Customize Everything
- Use it. For real. Be Like NIKE and Just Do It
- Mindset Alert – You have a personal assistant you never trained.



Why “Choose” You

Stand Out!

Look around at your competitor. Are you impressed?

You're Dealership is not Unique. You can be though!





### Internet Leads Received Time of Day Breakdown

Note: Includes all lead statuses for all Internet Leads

Time Received	Volume	Percentage
12AM - 1AM	89	1.7%
1AM - 2AM	57	1.1%
2AM - 3AM	31	0.6%
3AM - 4AM	64	1.2%
4AM - 5AM	51	1%
5AM - 6AM	130	2.4%
6AM - 7AM	110	2.1%
7AM - 8AM	95	1.8%
8AM - 9AM	173	3.2%
9AM - 10AM	267	5%
10AM - 11AM	342	6.4%
11AM - 12PM	394	7.4%
12PM - 1PM	322	6%
1PM - 2PM	403	7.5%
2PM - 3PM	331	6.2%
3PM - 4PM	359	6.7%
4PM - 5PM	384	7.2%
5PM - 6PM	341	6.4%
6PM - 7PM	316	5.9%
7PM - 8PM	312	5.8%
8PM - 9PM	220	4.1%
9PM - 10PM	249	4.7%
10PM - 11PM	183	3.4%
11PM - 12AM	129	2.4%

10.1%

26.3%

### Internet Leads Received Day of Week Breakdown

Note: Includes all lead statuses for all Internet Leads

Day Received	Volume	Percentage
Sunday	549	10%
Monday	939	18%
Tuesday	808	15%
Wednesday	782	15%
Thursday	827	15%
Friday	830	16%
Saturday	617	12%

Your Customer is Available.  
Are You?

Scheduling to Win  
Ghosting Your Staff  
After Hours Game Plan



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@ElianaRaggio  
@signontheline





# Round Robin VS The Bucket



Amanda Marie

May 30, 2017

Cradle to grave stores.. I need your help!

What is the most effective way to distribute leads/ phone-ups?

In the beginning of this year, we eliminated our internet dept. The internet dept. ran like clockwork but blending the sales and internet department has been challenging. We are struggling to find an effective process that doesn't leave me to be spending 1/2 my time still answering leads for sales reps.

Currently, internet leads are being round robined by schedule and phone ups are free game. The problem with this is that the CRM doesn't recognize when a sales rep has a customer, and even though it's set to reassign after 15 minutes, the next person may also have a customer. The phone ups are also not being put in the system the way they should be and its harder to track who's taking them because not all of our inbound lines are recorded.

I was thinking, maybe we should try something like the 1st two up people taking calls/leads until they get fresh up or set an appt. I see this being challenging on Saturday's and busy times though. Also, maybe rotating sales reps in some way on Saturday's to take 2 reps off the floor in 1/2 day shifts to just answer leads/phones

Thoughts? Feedback? Solutions?  
PLEASE and THANK YOU!



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@signontheline





# Internet Qualifiers

It's a Choice

Consequence VS Reward





## After Hours "Template" Option

### Template Preview - BH - Internet – After Hours Auto Responder

[Edit](#) [Delete](#)

Template Name: BH - Internet – After Hours Auto Responder Template Type: Email HTML Templates ☒ Highlight Auto Fields

Email Subject: Forgive the Delay

Hello [CUSTOMER FIRST NAME],

My name is [CSI AGENT FIRST NAME] and I am the Customer Care Manager here at [DEALER NAME]. My team and I handle all of the requests for information in the internet department. You sent your information request in after our normal working hours but I saw it come through so I wanted to send a quick email from home to let you know that we will contact you by phone as soon as we are back at the dealership. What time is best for us to reach out to you to cover any questions you have?

Do you prefer communication by text, phone or email?



[CSI AGENT SIGNATURE]



# Ready...Set...Go...

Read the "Lead" - Name, Source, Questions, Past "Lead" Files  
Respond Quickly but with Quality

## Brilliant at The Basics





# POLL QUESTION





# Customize the Conversation

The Source Holds all The Secrets

NON Customer Initiated

Payoff Request  
Customer in Equity  
Handraiser/Event

Customer "Lead" Initiated

Payment Ads  
Trade In-Buyer  
Finance Application





# First Response The "Phone Call"

## Pro - Tips

Voicemail

Active Listening

Just Ask Already

Weak VS Powerful

Is This a Good Time VS Do You Have a Few Moments

Don't Disclose the Vehicle



Watch Your Words - Don't Create Objections



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# First Response

## The First "Email"

### Pro - Tips

- Mindset Alert - You're Dealership is not Unique. You can be though.
- Call me maybe?
- Its Not All About You.
- Get Personal. Compliment, Recognize, Obligate and Give a Next Step.
- Watch Your Words. Are You Creating Objections?
- Manners Matter.





# The Handraiser/Event "Lead"

## The "Black Sheep"

### Template Preview - BH - 1st Response Internet - Handraiser

[Edit](#) [Delete](#)

Template Name: BH - 1st Response Internet - Handraiser Template Type: Email HTML Templates ☒ Highlight Auto Fields

Email Subject: You Entered a Contest and Won

[CUSTOMER FIRST NAME],

Welcome to the [DEALER NAME] Family. You recently submitted your information at an event and your contact information was then sent over to us. Great news, you won! Well, we think so. We've been assigned as your preferred dealership. I am reaching out and welcome you and let you know that we look forward to working with you when the time comes to own your next vehicle!

Are you interested in receiving information on a new vehicle?

[SALESPERSON SIGNATURE]



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## The "OEM" Sent It In Customer is Clueless

Template Preview - BH - 1st Response Internet – Cust. in Equity (NOT Sent in by Cust.)

Edit Delete

Template Name: BH - 1st Response Internet – Cust. in Equity (NOT Sent in by Cust.) Template Type: Email HTML Templates ☒ Highlight Auto Fields

Email Subject: Can I Borrow Your Car

Hello [CUSTOMER FIRST NAME]

Great news! Because of changing market conditions, [DEALER NAME] is expanding our pre-owned vehicle department. We can accomplish this in two ways: Purchase vehicles at public auctions where the vehicle history is unknown or from our own customers, where the history is no mystery. We need your vehicle! We are presently seeking clean, late model vehicles previously purchased by an individual and there is NO obligation for you to buy another one from us. Although keep in mind that this is also a great time to purchase a new vehicle. Our everyday low prices combined with current rebates and incentives could allow you to drive a brand-new vehicle for the same or maybe even less than it is costing you to drive your current one. A quick appraisal of your car will tell us if this is possible.

When would be a good time for you to bring in your vehicle for us to purchase it?

[SALESPERSON SIGNATURE]



## We NEED Your Trade

### Template Preview - BH - 1st Response Internet – Trade in Focused Lead

[Edit](#) [Delete](#)

Template Name: BH - 1st Response Internet – Trade in Focused Lead Template Type: Email HTML Templates ☒ Highlight Auto Fields

Email Subject: Your Online Trade in Evaluation

Hello [CUSTOMER FIRST NAME],

I just received your information from the trade appraisal tool that you used online to establish an initial vehicle value. Tools like that are convenient but often times they are used to get an “idea” of the vehicles value and often it isn’t what a customer is hoping for. The system doesn’t have the ability to take into account all of the factors we use when we actually appraise a vehicle at the dealership. Besides, as nice as it is to have an idea of what your vehicle may be worth, most customers tell us they would prefer to have a real dollar amount instead of an estimated range.

Knowing what a dealership will actually purchase your vehicle for makes the buying/shopping process that much easier and allows you to focus on the most important thing of all...finding your perfect vehicle. Your information didn't come through with what you are considering replacing it with. I would like to talk to you about your trade, the vehicles you're considering and any questions you have. When is the best number and time for me to reach you at?

[SALESPERSON SIGNATURE]



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@signontheline





## Standard "Lead"

Bobbie,

First of all, great choice! It's obvious you have done your research. This 2013 Laredo been an extremely popular vehicle which is why I want to go out onto the lot and actually put my hands on it.

### 2016 Jeep Patriot Latitude



Transmission: Continuously Variable Transaxle II,  
Radio: 430N, Quick Order Package 24G High  
Altitude Edition, ParkView Rear Back-Up Camera,  
2.0L 4 cyls, FWD, Bright White Clear C,  
stock # 16055, new, Safety equipment includes:  
ABS, Traction control, Curtain airbags, Passenger  
Airbag, Front fog/driving lights...Other fe... [view details](#)

MSRP \$27,155  
*Discount \$257*

**Internet Price**  
**\$26,898**

Sweat the Details

There is nothing worse than finding a great deal on the exact vehicle you want and then finding out it isn't available. Unfortunately, the information you sent in didn't come through with any particular questions. While I am out there do you have any other questions about options or condition that I can check on for you?





# POLL QUESTION





# Nurturing the "Lead" VS Follow Up

## Pro - Tips

The average buying experience sucks

Workarounds Don't Work - Offer and ASK

Be Specific - Ask For What You Want - CTA





# Emails That Engage

## Just Say No to Automation



### Pro - Tips

Subject Lines Matter

Opening Statement

Short and Sweet

End With a Question



**Veronica Dunford** I recently purchased a car (and I have preached it from both sides of this equation... the set it and forget it emails ruin the experience every time! A very well known local dealer completely lost the sale (and I would have been an easy sale) for using automation instead of human interaction and simply paying attention and doing his job. Unfortunately, his boss was paying attention to the follow up email I sent in explaining what went wrong, why I thought so 😊

Like · Reply · 1d



3



**Bobbie Herron** Listen to Listen. Not to reply.

Like · Reply · 1d



**Bobbie Herron** [Veronica Dunford](#) - Can you tell me more about the way it made you feel. How you knew, what you saw?

Like · Reply · 1d



**Veronica Dunford** The automated emails were still coming after the salesman made contact... then when he failed to follow up, I received the "We haven't heard from you, are you still interested?" email. He was clueless. I still gave him another chance, we've all been there (new) after all. The nonsense continued and the emails never stopped. I simply did not matter. They are a busy Highline store that made me feel like they did not need my money.

Like · Reply · 1d



1



**Veronica Dunford** The problem I have found in my job (as you know), with all the CRM's I have dealt with in my client dealerships and the CRM conversions I have helped with, the worst offenders are when the automated emails go out while the customer is actually in the showroom, or the salesman doesn't check the template and it goes out with the merge field codes or ALL CAPS where a merge field was... that isn't obvious of course! 😊

Like · Reply · 1d



1



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# What's a "Template"?

I Am Trying to Get Your Attention      Its So Hard to Say Goodbye

If at First You Don't Succeed      Why Cant We Be Friends

Your Vehicle is in Demand      I Will Not Give Up on Us

Call Me Maybe      Is It Me

This Will Only Take 26 Seconds





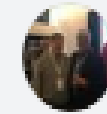


## Video

## Humanize Yourself

### Tips and Tricks

Short and Simple  
Introduce Yourself  
Deliver Value  
Ask for The Call



**Jake Davis** How to successfully incorporate a video strategy that isn't hit or miss while also trying to make as many phone calls as possible to try to get and keep potential customers engaged. Also how to handle customers who simply decide they're no longer interested or that are just researching and are a ways out from purchasing.

Like · Reply · 1d



3



Practice makes Perfect  
Create a Generic Library



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@signontheline





# Texting (Legally)

## #PracticeSafeText

### Where Can They Opt-In?

Signature Line

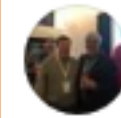
Email Requests

Demo Agreement

Buyers Order

Repair Order

Everywhere!!!!



Jake Davis

January 17 at 3:14pm · Dalton, GA

Do any of you have any tips/strategies when it comes to getting people to opt into your texts? Our team used to just send texts without getting an opt in and I got a much better response rate.

I would use something like the following:

"Hi [Name], This is Jake over at North Georgia Toyota, I just received your inquiry for pricing and info on the new 2018 4Runner you asked about on our website. Do you have a moment for a quick call so I can provide you with the info you have requested?"

Now, out of the CRM our opt in text reads:

"Text YES for agreement to get texts from North Georgia Toyota to [customer number]; not req'd for purch. Text STOP to OptOut; Msg&Data Rates May Apply"

The customers I get to opt in are typically people I have already talked too and told I am going to send an opt in too, but I am having a really hard time getting people to opt in without me first getting a hold of them. Any help would be much appreciated!



Mike Phillips Best transition from email/text to get people on the phone?

Like · Reply · 1d



4



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Hi [CUSTOMER FIRST NAME],

I have been unable to reach you during my attempts the last few days. I have often found that many of our customers prefer to text rather than communicate by phone or email. If you would prefer that I send information to you or answer questions by text then I am able to do that. For your protection, we only use text as a method of communication with permission. If you would like me to communicate with you in that way please text the word "Yes" to **XXX.XXX.XXXX**. If you prefer email or phone please reply and let me know.

When is the best time for me to try and reach out to you?

[SALESPERSON SIGNATURE]

**Bobbie Herron | Customer Experience Director**

Rockstar Motors  
3621 Sampson Road  
Owosso MI 48867  
989.672.9945 – Cell Phone  
www.ZMOT.Auto

**Prefer to Text?** Please Opt-In by Texting "Yes" to **(XXX) 867-5309**  
(Note - This number does NOT accept calls)



# Overcoming Obstacles

## That Was Easy, What About This One?



I have test driven this vehicle already (so I do NOT need to come in) and am looking to buy in the next two weeks. I am researching all dealerships in the state and I will work with the dealership who gives me the best offer out the door. I would like an out the door price on this model, availability on your lot (waiting time if you don't have it) and I also want to know how far over/under invoice you are quoting me. That way I can compare offers accurately. Please list any dealer fees out for me.



**Jake Davis** One other thing is inventory and how to overcome not having exactly what people want as far as used options go

Like · Reply · 1d



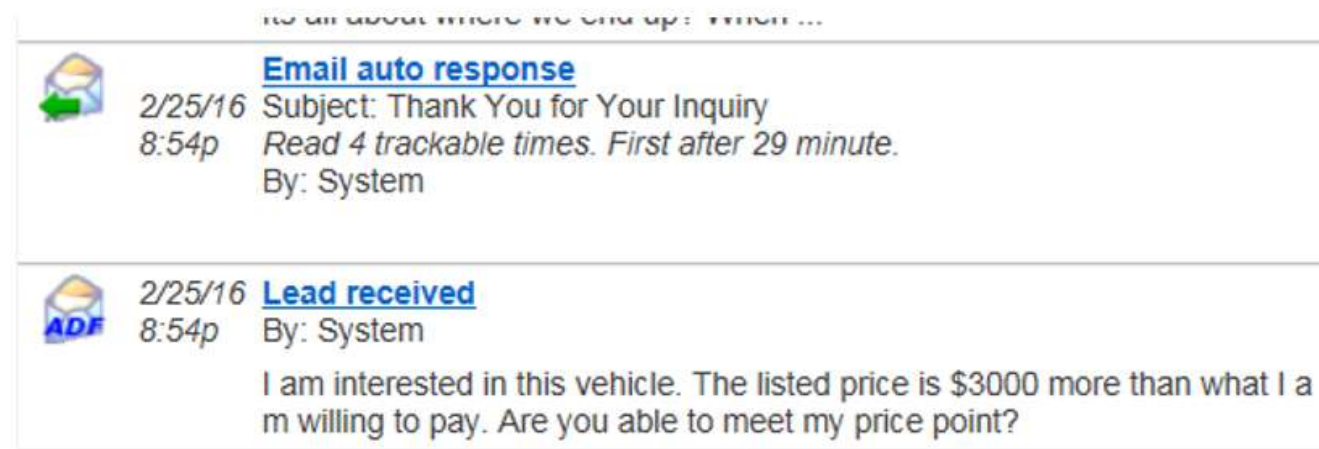
## Pro - Tips

Get Out of Your Own Way  
Sell Yourself not The Car  
They Aren't Taking the Bus





# Overcoming Obstacles



Wait, I Have a Question





# Appointments

## Customer Experience

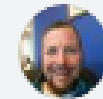
### Pro - Tips

Soft VS Hard  
VIP Process  
Confirmation  
Missed Chances



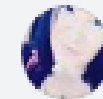
**Patrick OBrien** People not drilling down an EXACT time and setting "tentative" appointments "hoping" they will show up.

Like · Reply · 1d



**Clinton Bramlett** Well. I was late to this party BUT, my favorite topic along these lines, is, beastly appointment setting ability and how to climb that mountain. This is something that I really struggled with early on and still fumble from time to time.

Like · Reply · 1d



**Amanda Bales** One thing I would love to hear your take on is appt follow up once an appt has been made- should the BDC who set the appt call back out to confirm, the BDC manager or the sales consultant the appt is with? It's a big debate at my dealership

Love · Reply · 1d





# The Handoff

## The New Meet & Greet

### Pro - Tips

## Follow Through on Expectations



**Jennifer Briggs** Hand off from Appt Setters to Sales floor

Like · Reply · 1d



**Mike Phillips** Hand off and continuity is a big one!

Like · Reply · 1d



**Bobbie Herron** This is a favorite of mine! Great suggestions.

Like · Reply · 1d



**Jennifer Briggs** If you set an expectation for an internet buyer - does your store follow through?

Like · Reply · 1d



**Brian Rowe** Agreed **Jennifer**, it doesn't matter how great a job the bdc does if after the transition the level of customer service drops or isn't what the customer was expecting.

Like · Reply · 1d





# POLL QUESTION





## How many opportunities equal a sale?

You Can't manage what you don't measure

### They Actually Gave You A Chance

- How many engaged?
- How many set an appt?
- How many appt's were confirmed?
- How many showed up?
- How many sold?

### You Never Heard Back from Them

- How many never engaged?
- How quickly did you respond?
- Did your FIRST email address the ?
- Did you continue to follow up?
- How Long Did You Continue For?





The Bottom Line: Make It Easy





## POLL QUESTION





## SUGGESTED RESOURCES

- \* Me - Obviously!
- \* The EKX Automotive BDC and Internet Sales Group
- \* Hubspot Blog Resources
- \* CRM Support for Processes



## ACTION ITEMS

- \* Review Your “Lead” Hours
- \* Customize Your Processes
- \* Download the “Template” Resources
- \* Join a Virtual “20 Group” - Think FB





## Q&A: ASK OUR EXPERT





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One-on-One Virtual BDC  
Consulting  
With Bobbie Herron

\$5,000 Value

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Say Hello To...



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CEO of Herself (Well -Almost)

PartnerWithBobbie@Gmail.com

989.672.9945

@signontheline





## AFTER THE SHOW



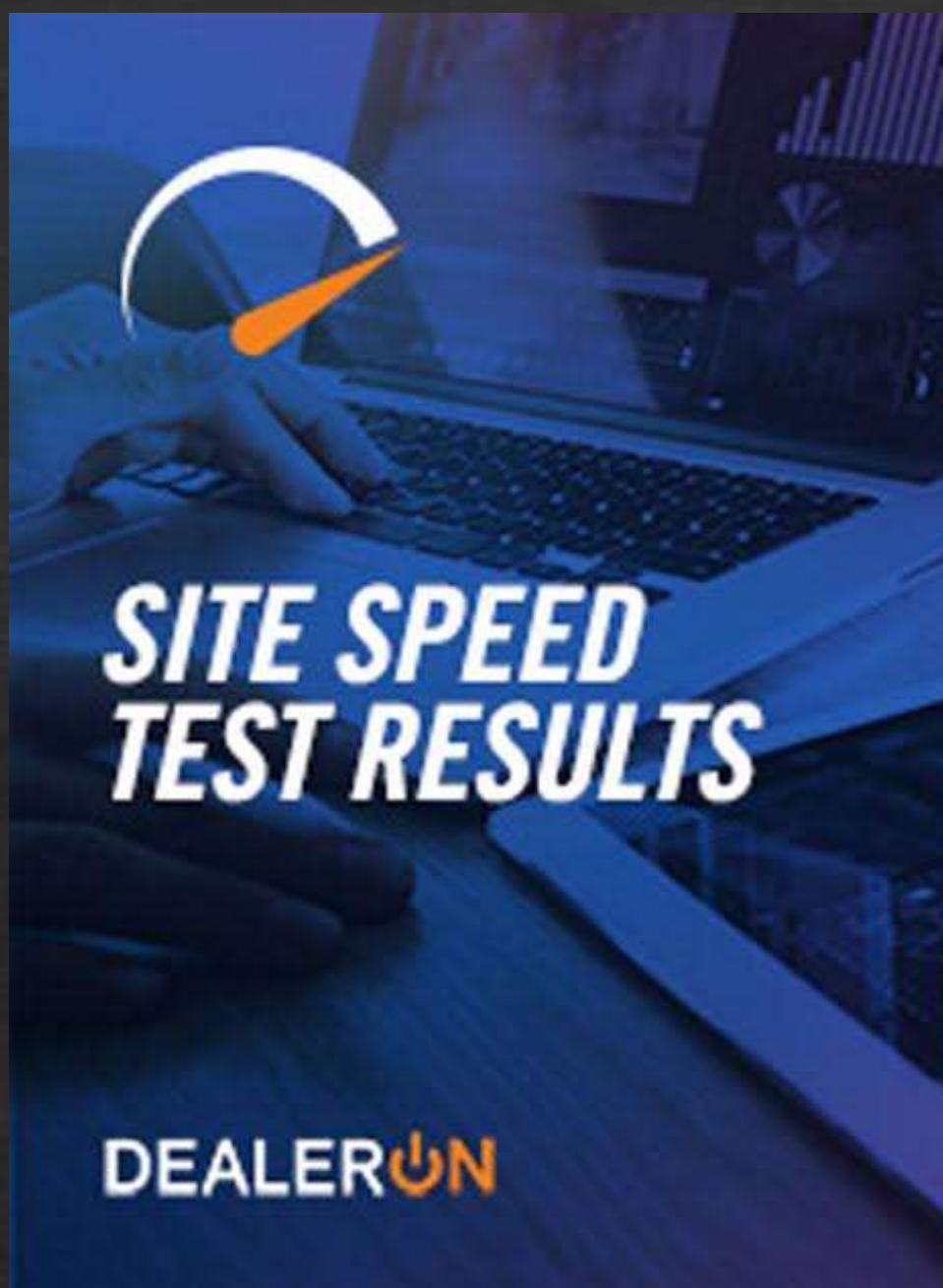
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CHECK OUT OUR NEXT WEBINAR

Thursday, Feb. 15 12pm EST / 9am PST

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# Beard & Hair - Ask Me Anything! (BAHAMAMA)

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Greg Gifford

"The Beard"

Vice Pres. of Search & Social



Shaun Raines

"The Hair"

Vice Pres. of Business Development