

Understanding User Roles of Automotive CRM Software

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Providing an end-to-end small business Customer Relationship Management (CRM), Sales Force Automation (SFA) and Enterprise Resource Planning (ERP Software) software solution to an entire automotive business cycle is an extremely large undertaking. From overseas production plants, to distribution points across the world, corporate sales centers to individual dealerships and retail points, there are a lot of people involved in the process from designing a car to where it is purchased by the end customer and driven away. And each point is just as important as the next one. That's one of the many reasons why understanding how an Automotive CRM, SFA and ERP Software solutions affect each point in the small business process cycle of the automotive industry is so important. In this white paper, we'll touch on each part of the automotive industry's chain of physical and transparent locations, and how a proper automotive CRM software solution can help automate the tasks and processes present at each. However, each process can vary depending on the unique individual business processes practiced at each location, so this white paper should be used as a guide only, and may need to be adapted to fit your individual needs.



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1.0 Concept, Design and Planning CRM

The very first stage, before a car is even produced, involves designers of concept cars, planning of production variables, and more. While most Automotive CRM solutions won't get specifically into the testing of concepts and designs from a functional standpoint, they will help this department with a number of automated features. A proper Automotive CRM software system will incorporate a fully functional Web based Project Management software piece, allowing you to properly manage and allocate time on each design project, as well as on an overview of the department as a whole. You can also reflect back on marketing metrics returned from marketing campaigns on similar projects, so you can easily compare and contrast what is most and least effective in the actual automotive design. Furthermore, and probably most importantly, this department needs great employee collaboration functionality, such as an integrated email system, auto-archiving instant messaging service feature, the ability to send and receive attachments on demand, and more. The most important part of this department is the creative ideas that come out of it, and allowing all the employees to collaborate, across continents sometimes, is hugely important. Remember, many heads are better than one, so bringing as many of your employees together is a critical step in getting the best possible result of their efforts. Other features to look out for are interactive, real time sales software white boards, application sharing, and human resources management. Payroll software would also be necessary to look at for this department as part of a larger solution, however, integrating payroll software is not very necessary and existing legacy systems will probably be sufficient for most small business needs.

2.0 Production, Testing and Distribution CRM

The next phase, at a production plant, will involve less actual users on the Automotive CRM software system, but more monitoring of activity. This phase should accurately control and track how many models are being produced in the plant, how many of them pass through quality assurance testing successfully, and if they fail, what problems they had. This phase is also going to be used to adequately determine which distribution point the new vehicles need to be shipped to, which can be automatically determined based on previous sales results from dealerships and distribution centers around the world. All of this legacy data can then be used to make an informed decision about how many orders to be fulfilled in each location, and can also be used to set production rates into the future. Lastly, this step needs to cover and track the actual shipping of vehicles to each dealership and/or distribution point in the delivery phase. This will keep an accurate reflection on where vehicles are, and automatically update inventory levels within the factory/warehousing facility itself, giving full corporate insight into various distribution metrics which can be critical for long-term business planning. It will also help your Quality Assurance and Testing department recognize any critical flaws in the design that have been re-occurring much faster than previously, and can allow this data to be sent back to the Design phase for better understanding of any potential design flaws.

3.0 Corporate Communications CRM, International, National and Regional

At this level in the data process flow, there are multiple facets to consider. First and foremost, you need an executive overview of the entire cycle, so all information that is being tracked in your Automotive CRM software system must be accessible at this point, easily compiled and reportable. Building charts, graphs and other necessary functionality is also critical at an executive overview point of control. There should be easy-to-setup reoccurring report capabilities, and warning flags that get thrown whenever something comes through the system that shouldn't, from an order for cars that is too large, to a dealer sale that is too small. This will help control the entire cycle, and keep things in their pre-defined state. Also at this level, the corporate marketing department functions on national and regional levels. A fully automated marketing automation campaign management feature is paramount at this level, and will help your marketing departments measure their successes and response rates to various marketing campaigns, including print, television, radio and online. This is essentially the central 'hub' of communication within the automotive industry CRM process, and great employee collaboration tools are also necessary here in order to be successful. Things like Instant messaging Service capabilities, email functionality integration, Web based Contact Management and other tools for facilitating communication between departments without geographical limitations will be critical in attempting to steer your corporation along in the right direction. Customizable reporting queries need to be able to be run on the database in real time sales software, allowing real, 360 degree insight into your automotive company's internal processes. Having an Automotive CRM software system that is updated in real time sales software and accessible completely from the corporate communications center is imperative to having a successful automotive CRM solution implementation.

4.0 Corporate Sales and Leasing CRM

One of the most important departments in your automotive business process are your sales teams that deal with corporate sales and leasing. Business to business (B2B) sales brings in a lot of revenue, and these clients are some of the most important to your small business. They require service quickly, efficiently, and effortlessly. Sales representatives need to be able to generate quotes instantly, deal with follow-ups effectively, and give your corporate clients the type of service they need to be customers for life. Your Automotive CRM software system should encompass this sales cycle wholly, from lead generation and management, pre-qualification, proposal and quote generating and closing the sale into an account. From there, automated Billing management & Invoice management cycles should kick in, as well as order management and inventory management systems, notifying the nearest distribution center of any pending shipments that need to be processed, including makes, models, options and more. Once this process is completely automated, your corporate sales and leasing team will be able to spend all their time doing what they do best - selling. This will turn into a more efficient, higher revenue stream, with less churn in your customer base. An important part of any automotive business cycle, making sure your corporate sales teams are empowered to handle customer inquiries efficiently is an integral part, perhaps one of the most important, of your automotive CRM implementation. A strong focus on sales

and marketing will help push the financing for any other additions and requirements you have through faster, by delivering a strong, positive Return on Investment (ROI) quickly and efficiently.

5.0 Car Dealership CRM

Another important facet of your Automotive CRM small business process is the physical car dealerships themselves. Imagine having a car dealer CRM sales representative dealing with a prospect out in the parking lot, configuring a new car from the CRM running on his mobile PDA. After he sells the customer, he submits the order via his wireless PDA directly to the regional distribution center, where it then automatically processes the order and gets the car ready for shipment. If the car with the right options isn't available in the regional distribution center, that order is then automatically forwarded to the nearest network hub of distribution centers, searching for a match as close as possible. This kind of automation isn't a dream any longer; it can be a reality with a proper Automotive CRM software system. Again, in a dealership setting, the CRM implementation is used primarily for Sales Force Automation features, including Lead Management, Web based Contact Management, Opportunity Management and Sales Forecasting. A manager can easily oversee how many sales his sales representatives have in their respective pipelines by simply logging into the Automotive CRM software system and running a revenue forecast, or pipeline forecast. Then this can be compared and contrasted against monthly targets by running a simple report. Car Dealer CRM can make all the difference in increasing productivity, but it also gives another added perk by showing your customers how automated and technologically advanced your dealership is compared to others, giving an increased sense of value to the end customer.

6.0 Service Department CRM

Service Department CRM is also another important part of your Automotive CRM software implementation. While in some cases, it may work hand-in-hand with the above mentioned New and Used Car Dealership CRM, it should be considered a separate entity as it is tracking entirely different data. However, the link is quite strong between the two. Take, for example, a new car that gets sold off the lot. When that car is sold, if the owner wishes to maintain his or her warranty, they need to follow the maintenance schedule. When a new model is sold, this information can automatically be entered into the CRM software system, with tasks automatically notifying the service department to call the owner before his required maintenance dates to schedule the next servicing. This will increase revenues generously throughout your service department, because they will be actively soliciting business instead of waiting for the business to come to them. You can also keep track of what types of cars are most frequently entering your service bay, the most common problems that are found, keep track of inventory of frequently used dealership supplies, and more. It's also useful for writing notes on the fly about possible causes of problems and their remedies to show to the end customers, without having to transcribe the same data to three different places as is usually the case now. Automating your service department with Automotive CRM is a great idea, and the potential for increases in revenues in this particular step in your Automotive CRM process is extremely high just by implementing the CRM software system in the adjacent dealership that the service department deals with.

7.0 Post-Sales Contact Center

Customers frequently want a way to interact with a car company after they buy their new car. Perhaps they want to commend a particular sales representative for the excellent service they received, or maybe they simply want to voice concerns or comments about the car that they now own. Sometimes warranty claims need to be processed through this channel as well, or a particular car company may choose to offer its own insurance or bonus programs with the purchase of a new car. Whatever the reason, most car companies require some sort of center for post-sales service and support, and the Automotive CRM software system should definitely be active there as well. While this is likely a call center of sorts, and some might think deploying a call center CRM software system may be a better idea, it's important to make sure that whatever you decide, the CRM software system in the call center must tie intricately into your Automotive CRM software system, preferably running on the same network. This will allow a holistic view into your customer lifecycle, making sure that customer satisfaction levels are high, identifying problem customers before they become a problem, and salvaging any damaged customer relationships you might have attained. This is also a critical step, and must be accessible by both the executive branch, as well as the concept and design branch of your Automotive CRM software system.

8.0 Other Things to Remember

Remember to ask yourself the following questions before you choose an Automotive CRM provider, such as Salesboom or Siebel Automotive:

- Will this Automotive CRM solution provide sufficient saleability for my 1 year, 3 year and 5 year growth estimates?
- If needed, how easy is it to export my data out of this Automotive CRM solution and into another?
- How well does this Automotive CRM solution integrate into other offerings that I may need in the future, such as ERP Software or SFA solutions?
- What is the real cost to my small business, both up front and ongoing, for the deployment and continual maintenance of this Automotive CRM solution?
- Is the data silo secure and impervious to malicious attacks?
- Does the Automotive CRM solution include a Service Level Agreement (SLA)?
- Do I retain ownership of ALL my data, including tasks, notes, and logged calls?
- Is there sufficient training available or provided to get all my staff on board quickly and effectively?
- What is the real expected time to deployment after I choose a particular vendor?

Make sure you have the answers to all these questions, sufficiently explained and in writing if necessary, before you continue to narrow down your possible automotive CRM providers.

9.0 Final Conclusions

An Automotive CRM implementation is a huge undertaking for any company, and it must be done right, the first time. It will likely involve quite a large investment (up front for traditional software CRM providers such as Siebel Systems, or considerably less and over time for an on demand web based CRM software system like Salesboom), and must be treated with the seriousness needed to accomplish such an endeavour. It is probably a good idea to roll out your CRM in phases - start with a few dealerships and service departments as test runs, as well as your corporate communications center, then phase in more and more as long as you're getting the results you expected. If there are any problems or kinks along the way, make sure you work with your Automotive CRM provider to solve the issues as they arise - your Automotive CRM provider should be there for you always, not just sell you the software and run. In an on demand hosted CRM software provider's world, they must earn your business month after month so you can be rest assured that they will always be there for you if you have any problems. Get your representatives trained and on-board as well; the more knowledge that exists, the better things will be. And lastly, make sure that you've embraced the corporate culture of CRM - don't try and make the software do all the work for you. CRM is 90% corporate strategy, 10% software and technology. Make Automotive CRM work for your small business by helping your small business work for the CRM.

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11.0 More Information

For more information regarding our products and services please visit our site at:

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