What are eContracting **Vital Signs?**

Vital Signs applies a very familiar concept to help Agents productively engage with their dealers. Technology can be intimidating; Vital Signs are intended to help an Agent have simple conversations about the Planning, Implementation, and Maintenance of the aftermarket selling process.

CONVERSATIONS

START TALKING TO YOUR DEALERS ABOUT eCONTRACTING

When to Talk About **What**

A dealer might be in one of three situations during a process change:

PLANNING

The dealer relies on the Agent for consultation, support and sometimes training. Dealers ALWAYS go through a decision phase, ranging from impulsive to drawn out. Agents can help dealers make informed decisions about systems and processes when it comes to eContracting.

IMPLEMENTATION

The X's and O's of setup are not that difficult, especially when all affected parties prepare and plan ahead. Agents need to impress upon dealers that system setup does not equal implementation. It is more about change management and how thoroughly F&I staff are on-boarded than learning new software.

MAINTENANCE

System utilization is very similar to measuring a F&I Manager's performance. You could ask broad questions like, "How are sales?" Or you could ask more probing questions like, "What percentage of sales get a full menu presentation?" Ask better questions, get a more accurate picture.

eContracting **Vital Signs** Checklist

Asking dealers the questions below will help you recognize when they need assistance. But this serves only as a guideline because every dealer and situation is unique.

PLANNING QUESTIONS

- ✓ Where do you sell products? (ex: F&I Box, Service Drive, Online Apps, BDC)
- ✓ Have you verified that your selling software (menu) supports all your products?
- ✓ Do all your F&I Salespeople use the Dealer's software system to get pricing and contracts? Is training needed? Who will train existing staff and new hires?
- ✓ Is everyone in the Dealership fully committed to the system and process change?

IMPLEMENTATION QUESTIONS

- ✓ Do you want to review your suggested retail pricing for each product?
- ✓ Does Accounting understand a "printed" eContract is a live contract? Do they have a plan and process to reconcile every contract in the Provider Portal(s)?
- ✓ Did all F&I Salespeople run a test deal to verify pricing? Was every test voided?
- ✓ Does everyone in the Dealership understand the best way to get software system support and help?

MAINTENANCE QUESTIONS

- ✓ Are any contracts being prepared outside the designated process? If yes, what is the common reason? Is it usually the same salesperson? Is it a specific product?
- ✓ If a contract requires voiding, does every F&I Salesperson know how to void the contract in the system it was created in? i.e. if the contract was created in the menu, it should be voided in the menu.
- ✓ Is every contract in the Provider Portal reconciled by your month end day? Every contract may be considered a live contract until voided.
- ✓ Do you have a method to ensure new F&I Salespeople are trained on the system, process, and support protocol?

need more information?

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