



**CRM training opportunities**

**Best practices**

**Our system support**

*and more...*



# ORIENTATION

Welcome to CRM University. Our team of experts – from Certified Trainers to technical developers to Performance Managers with retail automotive experience – are passionate about helping dealerships like yours reach next-level utilization and results with Connect CRM.

Wherever you are in your software journey, you have access to exclusive training opportunities – customized for every type of user on your team – that can transform your dealership's performance.



# WHY TRAINING MATTERS

## How it helps the dealership:

There's no longer a separation between business goals and software goals. When a dealership uses its software to its full potential, it reaches its full potential in sales, revenue, efficiency and employee retention.

## How it helps the dealer:

The modern automotive CRM is the modern salesperson's most important tool. While some may see training as a disruption of the sales process at first, they'll quickly see the positive impact it has on personal performance.

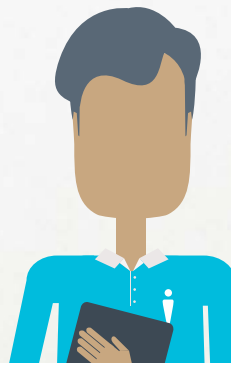


# KEY PLAYERS



## Performance Manager

Every Connect client gets a dedicated VinSolutions Performance Manager — a retail automotive expert who becomes an integral part of your team, understanding your business goals and helping your dealership achieve them with Connect CRM. The Performance Manager works mostly with key decision-makers in the dealership and focuses on strategy, measurement and results.



## Certified Trainers

VinSolutions' Certified Trainers combine retail automotive sales backgrounds with intensive training from VinSolutions to train your team effectively. Certified Trainers are expert Connect users with a deep understanding of how utilization affects a dealership's sales and service processes. They promote correct, consistent use of the product, both during onboarding and on a recurring basis, to ensure your continued success.



## CRM Champion

As soon as you sign with Connect CRM, we encourage you to appoint a CRM champion in your dealership. This might be someone on your existing team, or you might need to hire externally, but either way, it's a full-time role. The CRM champion will be trained by VinSolutions to mine your database for opportunities, facilitate system upgrades, and keep your team up to speed on new functionalities. The CRM champion represents CRM users throughout the dealership and interfaces directly with the support team at VinSolutions, getting questions answered and needs met.

# CLASS SCHEDULE

If you want to do something better, you can't just do it once. It takes continued progress – and CRM training is no different. At VinSolutions, we have multiple avenues to help maximize your team's CRM usage throughout your journey:

## **BUILD**

The critical start-up and onboarding phase

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## **ACCELERATE**

Continual evaluation and improvement of utilization and performance

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## **REFINE**

Exclusive opportunities for elite-level users

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VinSolutions

CRM

# **BUILD**

The critical start-up and onboarding phase

## eACADEMY

From day one, you can access VinSolutions' online eAcademy. With short and easy-to-absorb training videos available on demand, your team can get comfortable with the key concepts they need to use Connect CRM. The short, interactive videos will make sure you've mastered the concepts by the end of the course. Plus, management-only courses give you the foundation to set your team up for success.

### The VinSolutions eAcademy gives you:

- A simple way to learn the basics: signing in, completing tasks, logging customers
- On-demand access to video training courses
- Interactive quizzes to check your progress
- Management-only training courses
- Proof of certifications after completing a course

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***"Our on-demand videos help dealers master the basics, so they can build a foundation for success."***

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**Chris Hawthorne**

Director of Training, VinSolutions



## ON-SITE TRAINING

To ensure that your full team understands how to use your new software, VinSolutions offers prescheduled on-site training. Over the course of a week, our Certified Trainers will take you through a combination of classroom-style trainings and one-on-one sessions. By the end of training, you'll have new ways to improve performance with your CRM, and your team will know exactly what's expected of them.

### During on-site training, you'll:

- Meet with a VinSolutions Certified Trainer at your dealership.
- Learn real-world applications for everyday use.
- Explore more advanced CRM functions in classroom-style trainings.
- Get personalized training in one-on-one sessions.

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***"Our trainer was instrumental to our success and quickly became our go-to VinSolutions person. Vin's like that; they always put the client first."***

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### **Chuck Olsen**

Corporate Sales Manager, Boucher Automotive





## MANAGER TRAINING

Along with on-site training, VinSolutions offers special management-only training courses. You'll be trained on Manager Daily Duties – the specific tasks each manager in your dealership should complete every day to keep your team on track. We'll teach you how to use the tool to make sure your team is being held accountable, so you can get the most out of your CRM.

In your manager training sessions, you'll:

- Give your managers one-on-one access to VinSolutions' Certified Trainers.
- Determine the most effective Manager Daily Duties for each manager in your dealership.
- Build the best process steps and accountability for your team.
- Ensure that your processes align with your dealership goals.

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***"We make sure that by the end of training, managers are armed with everything they need to make their dealership successful."***

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**Mark Vickery**

Senior Director of Performance Management,  
VinSolutions



VinSolutions

# ACCELERATE

Continual evaluation and improvement  
of utilization and performance

## PERFORMANCE MANAGEMENT

Every Connect client is paired with a Performance Manager — a retail automotive expert who understands your business, your goals and your challenges. Your Performance Manager will help you through implementation, making sure your system and your team are both ready to go. But you'll continue working together long after that, proactively fine-tuning your practices to improve performance.

### Your Performance Manager will:

- Assist with implementation to ensure a smooth transition.
- Call you weekly for six weeks to get you off to a good start.
- Make monthly online video calls to help you stay on track.
- Provide the support you need, on your timeline, to solve your challenges and ensure success.

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***“Our Performance Manager is key to our success. He holds our feet to the fire every week, and he will dig deep into that data to ensure we're getting the best use of VinSolutions.”***

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**Greg Jensen**

Chief Operating Officer, Kocourek Automotive



## LIVE INDUSTRY WEBINARS

VinSolutions regularly offers live webinars on a variety of CRM and industry topics. Hosted by our team of technology experts with decades of retail automotive experience, our webinars will give you the insight and industry best practices you need to be successful.

By attending our live webinars, you can:

- Gain industry insights from leading automotive technology experts.
- Register for free, and watch the webinar on-demand after the event.
- Submit questions and receive answers in real time.

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***“Continual improvement is an integral part of being a modern-day sales professional in automotive.”***

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**Kevin Frye**

eCommerce Director, Jeff Wyler Automotive



## FIRST CALL RESOLUTION

No matter how well you've been trained, you might encounter problems that need a quick solution. Our technical support team is committed to connecting you with the right expert on the first call. You'll quickly get the answers you need — the first time.

Our First Call Resolution program provides:

- Over-the-phone access to dedicated technical support team members
- An average 15-second wait time — you'll speak to a person by the third ring

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***"You don't really want a provider, you want a partner — You want to know that if you need anything, you can reach out and they'll respond with answers. You get that with VinSolutions."***

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**Mary Olson**

CRM Administrator, Ferman Automotive



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CRM

**REFINE**

Exclusive opportunities for elite-level users

## VinWorx USER SUMMIT

Every year, VinSolutions hosts VinWorx, an exclusive training and networking event. Dealers from across the country meet at VinWorx to share CRM best practices, exchange tips, and learn from one another. Plus, VinSolutions hosts breakout sessions and seminars to help you get even more out of your system. This can't-miss annual event is open to all VinSolutions dealers.

### If you attend VinWorx, you'll:

- Collaborate with top-performing VinSolutions clients nationwide.
- Choose a track for your event sessions – sales, manager or admin – to focus on what matters to you.
- Network with peers facing the same challenges as your dealership.
- Get the latest industry insights and best practices from engaging keynote speakers.

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***“VinWorx is a very organized event from start to finish. Not only were the breakout sessions helpful, but it was also great to meet others from across the country to share ideas with!”***

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### Jeff Bernecker

Director of Growth and Development, Sid Dillon



## REGIONAL PERFORMANCE MANAGEMENT WORKSHOPS

To help users make the most of their CRM, VinSolutions offers regular live workshops hosted by Performance Managers. In these free sessions, Performance Managers address challenges and best practices around CRM usage. By taking advantage of face-time with Performance Managers, you can get your questions answered and deepen your understanding of your CRM.

**If you attend a Performance Management workshop, you'll:**

- Take advantage of in-person time with a Performance Manager.
- Get answers to common CRM usage questions.
- Gain insight into your CRM's features and how it can boost your business.

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***"We truly appreciate VinSolutions' dedication, customer education, training and support."***

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**Carolyn Money**

Owner, Money Automotive Center, Inc.





# LIFELONG LEARNING

Whether you're just getting set up or looking to fine-tune your processes, training should always be a top priority for your dealership. At VinSolutions, our team is committed to giving you the knowledge and support you need to be successful with your CRM — no matter where you are in your journey.

**To learn more about VinSolutions' training options for Connect CRM customers, schedule a demo at [vinsolutions.com/connect](https://vinsolutions.com/connect)**

