



A SMOOTH TRANSITION:

THE VINSOLUTIONS ONBOARDING PROCESS

CRM onboarding can make or break your CRM success. Our onboarding process is designed specifically to ensure the accurate transfer of customer data and to customize your CRM to meet your business goals. We work closely with your team every step of the way to ensure that your transition to VinSolutions is as seamless as possible:

1. REQUIREMENTS GATHERING

- Identify how the dealership operates today.
- Identify third-party applications for integration.

2. CONFIGURATION AND ACCESS

- Build new admin settings, processes and templates.
- Connect and receive third-party data feeds.

3. MIDWAY PROJECT STATUS

- Identify outstanding items.
- Assess project against training dates.

“I never felt like the onboarding process took time away from my business focus. We really like that VinSolutions understands our business.”

Chuck Olsen
Corporate Sales Manager, Boucher Automotive Group

4. DATA AND DESKING

- Verify data accuracy, and import data.
- Configure and balance desking module.

5. FINALIZATION AND TRAINING

- Wrap up final configuration details.
- Conduct virtual product training.
- Initiate eAcademy coursework.
- Conduct onsite training.

OUR SUPPORT TEAM



Project Manager

Project Managers actively manage each step of the process to ensure onboarding is completed quickly and correctly. They work directly with your team to provide instruction and answer questions.



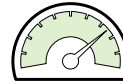
Launch Consultant

All of our Launch Consultants have automotive backgrounds, so they know what matters most in a dealership setting — but they also know no two dealerships are alike. They work with you to understand your unique processes and make sure Connect CRM works with you the way you need it to.



Data Consultant

Data Consultants make sure your data is transferred from third parties or prior CRMs to Connect CRM cleanly, accurately and efficiently. With their guidance, you won't lose valuable records or time during the onboarding process.



Performance Manager

Performance Managers form lasting partnerships with dealerships, beginning with onboarding and developing into consistent intensive interaction with key decision-makers in your dealership. Performance Managers focus on strategy, measurement and results, making sure you always get maximum value from Connect CRM.

“VinSolutions was our third CRM in four years, so I had concerns about changing again. It has been over one year now, and it has been the best change for our dealership.”

Tammy Neiter
Sales, Twin City Toyota

READY TO GET STARTED?

To contact VinSolutions today and take the next step toward your business goals, visit vinsolutions.com or call 877.768.6134.

VinSolutions
Make every connection count.

A COX AUTOMOTIVE BRAND