VinSolutions
Make every connection count.

COUNTDOWN TO CONNECTION

Your VinSolutions Implementation Checklist

To start benefiting from your new industry-leading CRM, you'll need to prepare for a successful transition. Set your dealership up for success by completing these tasks prior to implementation:

- ☐ **Collect All Existing Data**
  - Now is the time to take a look at the contract you have with your previous vendor. When does your contract expire and what are the steps you need to take to collect all of your existing data before the expiration date?
- ☐ **Clean Up Your Data**
  - Prior to extraction, be sure to clean up all the data from your previous vendor. Have you updated first names, last names, and contact information, and all lead sources?
- ☐ **Prioritize Forms**
  - In order to ensure a smooth transition, it is helpful to prioritize forms. Which deal jacket forms are the most important to your business?
- ☐ **Make a Sales Plan**
  - Take a look at your client list and make a plan for how you will utilize the system to reach them. What type of activity has been most engaging for them in the past? Which new features can you use to improve engagement?
- ☐ **Determine a Structure**
  - Consider who will need to be System Admin, Managers, Sales Team, etc. How will you structure your users and what type of access will each user need?