

DIGITAL Dealer™

WORKSHOPS NORTHEAST

Cloud Trainer, LLC
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President





Getting Right to the Heart of BDC Success

The
3P's



PEOPLE



PROCESS



PROFITABILITY

BDC, CRC, CCC, CDC, SCC, ACC...

It Doesn't Matter What You Call It...

- You better be READY for it!
 - Dealer Principal/GM support
 - 100% manager buy-in
 - Prove its profitability

SALES



**The Purpose Of The BDC Is To
Increase Sales & Profits!**





PEOPLE

- ~ The right people
- ~ Training
- ~ Feedback and collaborative learning



peo-ple
/'pēpəl/

noun

The most important resource in the workplace.





Most Important Resource

“The achievements of an organization are the results of the combined effort of each individual.”

– Vince Lombardi



80%

of employee turnover is
the result of “bad hiring
decisions.”

- Harvard Business Review



Your Recruitment Process Is Crucial



the **Leader** (BDC Manager)

- trainer, coach, and manager
- excited and motivated
- outstanding telephone skills
- excellent oral & written communication skills
- exceptional appointment setting skills
- sales experience



Appointment **Setters**

- interview by phone first
- excellent phone voice
- sounds excited
- good communication skills
- effective follow-up skills
- stable job history





Put Together A Plan

- Manufacturer training
- BDC manager
- Vendors
- Online training





- CRM usage
- Process maps
- Email, phone, chat, text follow-up
- Phone scripts
- Database integrity



we make
training fun!

- Clarify roles
- Share knowledge
- Quizzes
- Contests
- Rewards
- Make learning fun!





- Assumptive questioning
 - Product knowledge
 - Pacing – align and agree
 - Scheduling valid appointments
- Role plays
 - Practice voice messages
 - Listen to phone calls
 - Overcoming objections
 - East/West appointment setting





Explore The Potential Of The Team Through Collaboration

- Communicate the “Book of Business” every day
- Share lessons learned
- Talk about challenges and issues
- Individual accountability



RULE

YOURSELF

**“You are the sum of all of your training.
It's the only way to get better.”**



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PROCESS

- ~ Consistent and repeatable processes
- ~ Phone-centric environment
- ~ Individual accountability



proc'ess

/'prä,ses,'prō,ses/

noun

A clearly defined series of actions or steps taken in order to achieve a particular end.



Establish A Phone-Centric Environment

- The BDC is a Call Center!
- All agents should be on the phone!
- What does a successful call sound like?
- Track inbound phone outcomes
- Know agent outbound performance & volume
- NO place for “average” telephone skills



Average Skills



Pick Up The Phone

Make Something Happen

- Tone and inflection (mirrors!)
- Pacing the conversation
- Identify prospect's wants and expectations
- Dealership value proposition scripting
- Confirm caller's full contact info
- Always ask for the appointment



Micro-Management Required!



- CRM usage analysis
- Openly assess processes
- Inspect lead information
- One-on-one coaching
- Individual accountability
- CRM technical issues



LEAD MANAGEMENT

- Telephone & text follow-up plan
- Chat process
- Automated email action plan
- Custom email plan
- Use video
- Lead routing (150-250 opportunities per agent)
- Bridge the gap between the showroom and BDC
- BDC bonuses, incentives, and rewards



CONSISTENT
AND
REPEATABLE
PROCESS



Coordinate With The Marketing Function

- Align with digital and offline marketing tactics
- Customize phone scripts for promotions
- Practice phone scripts in group training
- Mirror email campaigns with offline campaigns
- Segment service data: email and phone
- Control email “blasts”
- Measure and report email marketing results





PROFITABILITY

- ~ KPIs
- ~ Metrics and reporting
- ~ Costs control and profit

prof-it-a-bil-i-ty
\,prä-fə-tə-'bi-lə-tē

noun

The ability of a business or department to earn a profit.



Performance Benchmarks



**The 60% Rule
Based On Opportunities
(Chat, Phone, Text, Email)**

100 Opportunities x 60% = 60 Connections

60 Connections x 60% = 36 Appointments

36 Appointments x 60% = 21.6 Shows

21.6 Shows x 60% = 12.96 Sold

Average Gross



KPIs: Key Performance Indicators

Connection Ratio

- 100 Opportunities x 60% = 60 Connections

Appointment Ratio

- 60 Connections x 60% = 36 Appointments

Show Ratio

- 36 Appointments x 60% = 21.6 Shows

Sold Ratio (Total & Lead Source)

- 21.6 Shows x 60% = 12.96 Sold

Average Gross



Measure & Report

INDIVIDUAL and GROUP Performance



The BDC Must Be A Profit Center

- Pay plans must make financial sense
- Validate performance metrics then pay
- Agent deal gross reporting
- Control expenses
- BDC P&L Statement



Conclusion

- Plan your BDC before implementing – prove its profitability
- Assess your recruiting process
- Hire qualified people
- Develop a training plan
- Train regularly and consistently
- Build a telephone-centric BDC
- Design consistent & repeatable processes
- Inspect what you expect!



Conclusion

- Hold individuals accountable for performance
- Measure group performance
- Establish KPIs to measure success
- Track and report key metrics and make improvements
- Devise pay plans that make financial sense
- Validate performance targets BEFORE compensating
- Control expenses
- Produce a P&L Statement for your BDC



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