Optimizing Lead Management Performance Playbook

Recommended processes and best practices for maximizing Sales & BDC effectiveness with Sales AI

Introduction:

This playbook is designed to help you implement Sales AI effectively as part of your dealership operations. These recommended workflows and operational best practices will optimize your CRM and Sales AI integration while ensuring that your teams work seamlessly alongside the AI for optimal performance.

Recommended Workflow 1: Unresponsive Lead Follow-Up

Ownership Key

Sales AI = BLUE

Dealer Reps = RED

Customer is Unresponsive / Unresponsive Lead Follow-Up Workflow Goals:

1. Get the customer to book an in-store appointment, or
2. Get the customer to request/accept a phone consultation with a sales rep

Follow-Up CTAs: These CTAs are present in every interaction, and the AI consistently pushes for these results throughout the conversation.

Day 1 (internet lead is received)

Immediate Actions:

1. Sales AI Email with Initial Response - FQR: *"Do you want to be called at X to quickly discuss more details over the phone?"*

2. Sales AI Text with Initial Response: *"Do you want to be called at X to quickly discuss more details over the phone?"*

3. Create custom vehicle walkaround video and send via text or email:

- New lead has come in
- View lead information and customer notes
- Record video of the vehicle they're interested in and introduce yourself as AI NAME's partner
- Recommended Subject Line if sent by email: *"Video of CUSTOMER NAME's YMM at DEALERSHIP NAME"*

5 minutes after lead is received: Phone Call

View the AI's conversation and see how customer responded to phone call request question.

- **Accepted a Phone Call:** If they accepted a call, introduce yourself as AI NAME's partner. Mention that they should have received an email/text from her already.
- **Declined Phone Call:** If they declined a phone call, continue to let the AI work the lead. Do not call them until reengagement occurs.
- **Leaving a Voicemail:** Let the customer know that they can call you back or email/text AI's NAME back, since you're partnering together on this - whatever is convenient for them

15 minutes after phone call: Email and Text

Identify 3-5 similar vehicles in-stock: *"You submitted a lead on X, but you may also be interested in these other vehicles we currently have on the lot."*

- *Note:* This step is very important if the AI performed a Sales Handoff because the vehicle wasn't in the inventory feed,

A few hours later: Phone Call

Day 2: Actions

- **Sales AI Email**
- **Review AI's conversation history and update customer record**

At the end of the 1st day or beginning of the 2nd day, review the AI's conversation with the customer to see if :

- the AI acquired any new phone numbers
- the customer indicated a channel preference (SMS or email)
- or if the customer requested a phone call

Update the customer record accordingly.

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Recommended Workflow 1: Unresponsive Lead Follow-Up

Follow-Up Cadence for Unresponsive Leads

Ownership Key

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Day 1: Sales AI Email with Initial Response
Day 1: Sales AI Text with Initial Response:
Day 1: Create custom vehicle walkaround video and send via text or email

- 5 minutes after lead is received: Phone Call
- 15 minutes after phone call: Email and Text
- A few hours later: Phone Call

Day 2: Email
Day 2: Phone Call
Day 3: Email
Day 3: Phone Call
Day 3: Text
Day 4: Phone Call
Day 5: Email
Day 5: Text
Day 6: Phone Call
Day 7:
Day 8: Email
Day 9: Phone Call
Day 10:
Day 11: Email
Day 12:
Day 13: Phone Call
Day 14: Email
Day 15: Email and Text from "General Manager"
"Hi CUSTOMER, Thank you for considering DEALER NAME. My name is X, and I'm the General Manager. Please feel free to reach out to me directly during your research and purchase process. I'm more than happy to help with anything you might need. Thanks again!"
Day 16:
Day 17: Email
Day 18:
Day 19:
Day 20:
Day 21: Email
Day 22:
Day 23:
Day 24:
Day 25:
Day 26:
Day 27:
Day 28: Email
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Day 49:
Day 50:
Day 51: Email

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Recommended Workflow 2: Re-engagement Follow-Up

Re-engagement Follow-Up Workflow Goal: To get the customer to re-engage in conversation.
In this workflow, the AI asks open-ended questions and is less aggressive on pushing for an appointment.
Example questions:

- *"Do you have any questions?"*
- *"Are you still in the market?"*
- *"Just wondering if you need any information or if there's anything else I can help you with right now."*

Day 1 Actions:

1. Sales AI Email:
"I wanted to follow up with you based on our conversation yesterday. Let me know if there's anything else I can help you with."
Pushes for in-store appointment

2. Sales AI Text:
I wanted to follow up with you based on our conversation yesterday. Let me know if there's anything else I can help you with."
Pushes for in-store appointment

Follow-Up Cadence for Re-engagement

Day 1: Sales AI Email
Day 1: Sales AI Text
Day 2: Email - Pushes for in-store appointment
Day 3: Email - Pushes for in-store appointment
Day 3: Text - Pushes for in-store appointment
Day 4:
Day 5: Email
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Best Practices for Optimal BDC and Sales Execution with Sales AI

Setup

- **Disable any autoresponders.** If you were using an after-hours or all-hours autoresponder prior to Sales AI, disable the automated replies before going live with the product. It's important that all of your customer communications are consistent and working cooperatively with one another. With the introduction of Sales AI, there is no longer any need for an after-hours autoresponder, as the AI will immediately reach out to and nurture all Internet leads 24/7.
- **Customize processes by lead source where needed.** Consider creating separate Internet processes for individual lead sources that require very specific workflows and additional touchpoints. Common examples of this would be Sell My Car and trade-in sources like KBB ICO and AccuTrade, as well as chat solutions such as Gubagoo and CarNow.
- **Create a Sales AI contact on all personnel devices.** Have all BDC or Sales Reps and Managers create a contact in their phone labeled "Impel Sales Assistant" or "Impel Sales AI". The phone number is 1-415-849-4204. This will ensure that your personnel can recognize the notification texts, and that they don't ignore them or block them unintentionally.
- **Create email folders for AI notifications.** This will ensure your reps can easily and quickly access and focus on Sales AI notifications, preventing them from being buried in each rep's general inbox.
- **Set phone and email notifications according to Operating Hours.**
- Set up AI notifications as follows:
  - By **text** for interactions during operating hours
  - By **email** for after-hours interactions

  Otherwise, your reps will receive phone alerts all night long, as many customers choose to engage and book appointments with the AI when the dealership is closed.
- **Set up AI notifications in the dashboard.** Check the AI Dashboard Notifications section on the Settings page or connect with your Impel CSM regularly to ensure all existing and newly onboarding team members are set up to receive important AI notifications. Setting reps as CRM users alone will not enable them to receive critical AI communications, like when an appointment has been set or a conversation requires human intervention.

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Reminders for BDC Reps, Sales Reps and Team Managers

Customer Management:

- **Use the customer's preferred contact method.** Always respect a customer's preferred method of contact rather than blindly following through on scheduled tasks. Disregard scheduled tasks that don't align with a customer's stated preferred method of communication. Check the AI's conversation history to see if a customer has expressed their preferred contact method to the AI as they often do.

Phone Calls:

- **Vary your approach.** If you've tried calling a customer and you keep getting their voicemail, try calling at different times throughout the day. Vary your phone call outreach times for each scheduled phone task: morning call, afternoon call, early evening call, etc.
- **Always leave a voicemail.** Leave a voicemail after an unanswered phone call to a customer - don't just hang up. In the voicemail always reference the content you've included in your emails and texts, and reference the AI conversations. Send a follow-up text after leaving a voicemail, mentioning the fact that you just tried calling.

Successfully Handling Customers Alongside the AI:

- **Treat the AI like another sales rep.** Remember that you and the AI are partnering together on customer communications. As you're separately trying to contact shoppers, consistently reference the AI's outreaches and refer to the AI by name.
- **Begin your day by reviewing last evening's activity.** When you come into the dealership each morning, start your day by reviewing all of the notifications you received from overnight activity. Remember that roughly a third of all leads are engaging after-hours, with full conversations often happening when your dealership is closed.
  - Immediately prioritize appointments that were scheduled overnight. Check to ensure the vehicle is available. If not, reach out to the customer immediately with other similar options that they may be interested in test driving.
  - Review and prioritize Sales Handoff conversations. Was a phone call requested? Is the customer asking a question that requires sales expertise? Prioritize all handoffs so that customers who are waiting for you to contact them receive a prompt reply.
- **Check for trade-in information.** When the AI schedules an appointment for a customer, she'll always follow up and ask them if they have a vehicle they may be interested in trading in. Most of the time, the customer will answer this question, so make note of their response and update the customer record accordingly.
  - If the AI does a Sales Handoff and you're able to schedule an appointment with the shopper, ask them if they have a vehicle that they might be interested in trading in at this point as well.

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Considerations for Management When Implementing Sales AI

Plan for change management

- Working effectively with Sales AI will require some degree of change management for your BDC and Sales operations, and a modification of roles & responsibilities. Now that you have an always-on technology responding immediately to incoming leads, following up with leads, answering most routine questions, gathering information, and scheduling appointments, the roles and key responsibilities of your BDC and Sales team members will evolve in a way that increases their productivity and efficiency.
- Some of our most successful customers have used the introduction of the AI to elevate the status of their human team members, and in some instances, encourage their team to think of themselves as the AI's Manager or Senior Team Member to whom the delegate recurring, higher-funnel tasks and activities.

Actively coach your team to work differently

- Your team will now be working collaboratively with a sophisticated conversational AI platform. To fully take advantage of the technology, you'll need to encourage your team to repurpose their time and energy in ways that leverage the AI, increasing their effectiveness and productivity. They are likely very used to viewing routine tasks and administrative duties, such as chasing unresponsive leads, writing emails, and answering routine questions, as their main responsibilities and key indicators of performance.
- By leveraging Sales AI, they'll actually work on higher-quality, ready-to-buy leads and more showroom appointments, and they'll get more re-engaged customers from the AI's long-term follow-up. That means they can repurpose their time toward nurturing the hottest leads, making phone calls, closing deals, managing showroom appointments, giving high-value customers white-glove treatment, and more.
- Collaborate with your teams to help them evolve their roles and think differently about their deliverables, modify their key activities, and reimagine what success looks like when AI automation is part of the BDC/Sales process.