

Standard Operating Procedure (SOP)

Impel Chat AI – Sales & Internet Department Anderson Auto Group

1. Purpose

This SOP defines the standards and expectations for the use of Impel Chat AI across all Anderson Auto Group dealerships. The objective is to maximize the value of our AI investment by streamlining customer engagement, improving operational efficiency, and delivering a superior, consistent customer experience.

2. Background

Anderson Auto Group has implemented the full suite of Impel AI products, including Chat AI, Sales AI, Marketing AI, and Service AI. This SOP focuses exclusively on Chat AI, a next-generation conversational platform designed specifically for automotive retail. Chat AI automates and personalizes customer engagement for both sales and service, leveraging advanced generative AI and deep dealership system integrations.

3. Scope

This SOP applies to all Sales and Internet Department staff at the following Anderson Auto Group dealerships:

- Anderson Toyota
- Anderson Chrysler Dodge Jeep RAM
- Anderson Nissan
- Anderson Ford Kingman
- Anderson Ford Bullhead City
- Anderson Chevrolet
- Anderson Honda

4. Chat AI Capabilities & Dealership-Specific Notes

General Capabilities:

- Provides 24/7 automated, human-like chat coverage for sales and service inquiries
- Delivers VIN and stock number specific, dealership-customized responses to questions about vehicles, financing, trade-ins, and service
- Integrates with inventory feeds, CRM platforms, and scheduling systems for real-time information and appointment booking
- Sends real-time alerts to staff for seamless handoff when human expertise is required
- Customizable to reflect dealership policies, value propositions, and OEM brand standards
- Accessible from all digital channels, including website, social media, email, and digital ads

- All chat conversations can be monitored and reviewed in the Impel Chat AI dashboard

Dealership-Specific Functionality:

- **Service Appointment Scheduling via Chat AI:**
 - *Enabled:* Anderson Nissan, Anderson Ford Kingman, Anderson Ford Bullhead City, Anderson Chevrolet, Anderson Honda
 - *Not Enabled:* Anderson Toyota, Anderson Chrysler Dodge Jeep RAM
- **Automatic Sales Appointment Logging to VinSolutions CRM:**
 - *Enabled:* Anderson Toyota, Anderson Nissan, Anderson Ford Kingman, Anderson Ford Bullhead City, Anderson Chevrolet
 - *Not Enabled:* Anderson Honda, Anderson Chrysler Dodge Jeep RAM (due to OEM restrictions)

5. Policy & Procedures

A. Allow Chat AI to Lead

- Do not intervene in active chat conversations unless Chat AI explicitly requests human assistance or escalates the chat.
- Trust the system to handle routine inquiries, appointment scheduling, and customer qualification.

B. Sales Team Responsibilities

- Focus on high-value activities: phone calls, in-person appointments, and relationship building.
- Respond promptly when Chat AI escalates a conversation due to customer request, complex financial discussions, or high-value opportunities.
- When a takeover request occurs and personally identifiable information (PII) is gathered (such as name, phone number, or email), the lead must be manually entered into the CRM under the representative's name. The correct source should be listed as "Impel - Chat."
- For dealerships where sales appointment logging is not automated, ensure manual entry into VinSolutions CRM as needed.

C. Internet Department Responsibilities

- Allow Chat AI to manage initial customer outreach and qualification.
- Prioritize follow-up with qualified leads and relationship-building activities over manual chat monitoring.
- Do not send mass emails or bypass Chat AI for initial customer contact.

D. Service Chat Handling

- For dealerships with enabled service scheduling, Chat AI will manage appointment bookings and service inquiries.

- For Anderson Toyota and Anderson Chrysler Dodge Jeep RAM, where automatic service scheduling is not available, Service BDC schedulers can be configured to receive real-time notifications from Chat AI when a customer inquires about service. This ensures that service-related requests are promptly addressed by the appropriate staff, maintaining a high level of customer responsiveness.
- Chat AI will inform customers at these locations that a service representative will follow up to complete their request.
- Sales teams are not responsible for service chat interruptions.

E. Escalation Protocol

- Chat AI will alert staff for live handoff in the following scenarios:
 - Customer requests a live representative
 - Financial or trade-in discussions require personal handling
 - High-value or sensitive opportunities are identified
- Respond to escalations promptly to ensure a seamless customer experience.

F. Knowledge Bank Updates

- If a customer asks a question that Chat AI cannot answer, and the inquiry is nuanced or dealership-specific, it may be possible to add this information to the Chat AI knowledge bank for future use.
- Only an Impel Admin (Trey Athay, Randy Athay, or Rob Kahla) is authorized to submit and update knowledge bank entries. Staff should escalate these requests to one of the designated admins for review and inclusion.

6. Benefits & Expected Outcomes

- **Efficiency:** Monitoring chats is not necessarily needed. Staff time is focused on closing deals with current internet leads and building relationships.
- **Conversion:** AI nurtures and qualifies leads, allowing staff to engage only when most impactful.
- **Customer Experience:** Customers receive immediate, accurate responses 24/7, enhancing satisfaction and trust.
- **Workload Reduction:** Fewer manual tasks and service interruptions for sales teams.

7. Compliance

Strict adherence to this SOP is required. Bypassing Chat AI, manually intervening in chats without escalation, or mishandling chat handoffs undermines efficiency and the customer experience, and may result in corrective action.

8. Key Takeaways

- Chat AI is the first point of contact for all sales and service chats.
- Staff should only intervene when prompted by the system.

- Leads with personally identifiable information (PII) must be manually entered into the CRM with the correct source.
- The Impel Chat AI dashboard is the central location for monitoring all chat activity.
- Knowledge bank updates are managed by designated Impel Admins.
- Focus your efforts on closing deals with current internet leads and building relationships.
- Consistent use of Chat AI ensures a professional, scalable, and efficient customer journey across all Anderson Auto Group dealerships