

Standard Operating Procedure (SOP)

Impel Sales AI – Sales & Internet Department Anderson Auto Group

1. Purpose

This SOP defines the standards and expectations for the use of Impel Sales AI at Anderson Auto Group. The objective is to maximize lead engagement, ensure consistent follow-up, and increase showroom appointments and sales conversions through AI-driven automation, while freeing up internet department staff to focus on high-value activities such as phone calls and relationship building.

2. Background

Anderson Auto Group has implemented the full suite of Impel AI products, including Chat AI, Sales AI, Marketing AI, and Service AI. Impel Sales AI is an advanced automotive conversational AI platform used to engage, nurture, and follow up with internet leads via email and text. Sales AI is fully integrated with VinSolutions CRM, ensuring all lead activity and communication is tracked and actionable. This SOP is aligned with the Impel Sales AI Playbook and is designed to optimize the partnership between Sales AI and our staff.

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. Sales AI Capabilities & Anderson Auto Group Implementation

Capabilities and Implementation Details:

- **VinSolutions CRM Integration:** All Sales AI activity—including emails, texts, appointment scheduling, and lead status changes—is automatically logged in VinSolutions. Assigned users can view conversation history, AI actions, and next steps directly in the CRM.
- **Automated Lead Nurturement:** Sales AI persistently follows up with every internet lead using a proven cadence of texts and emails, designed to maximize engagement and move leads toward booking an appointment or requesting a phone consultation.

- **Freeing Up Staff for High-Value Work:** By automating routine outreach, Sales AI allows internet department staff to focus on making more phone calls, handling live handoffs, and building relationships with engaged prospects, rather than spending time on repetitive emails and texts.
- **VIN and Stock Number Specific Responses:** Sales AI provides detailed, accurate answers to customer questions about specific vehicles in our inventory, including VIN and stock number details, trade-in options, and financing inquiries.
- **Automatic Carfax Report Delivery:** When a customer requests a Carfax for a used vehicle, Sales AI will automatically provide the Carfax report to the customer without requiring manual intervention.
- **24/7 Lead Coverage:** Sales AI ensures that every lead receives an immediate response, regardless of the time of day, and continues nurture efforts after hours, so no opportunity is missed.
- **Consistent, Professional Communication:** All customer interactions are dealership-branded and follow a unified, professional tone, ensuring a seamless customer experience.
- **Escalation and Handoff:** When a lead is ready for a live conversation or has a complex question, Sales AI notifies the assigned user to the customer lead in VinSolutions based on customer responses, enabling a smooth and timely handoff.
- **Actionable Notifications:** Staff receive clear notifications (via text or email, as configured) when human intervention is required, an appointment is set, or a lead needs immediate attention.
- **Compliance and Data Handling:** All personally identifiable information (PII) and lead data are managed in accordance with Anderson Auto Group's privacy policies and securely tracked within VinSolutions.

5. Policy, Procedures, and Recommendations

A. Initial Setup and Best Practices

- **Autoresponders disabled:** All after-hours and all-hours autoresponders have been disabled. Sales AI now handles all initial and ongoing lead engagement.
- **Customize processes by lead source** as needed for unique workflows (e.g., trade-in, chat, or third-party sources).
- **Create a Sales AI contact:** All BDC, Sales Reps, and Managers must add a contact in their phone labeled "Impel Sales Assistant" or "Impel Sales AI" with the phone number **1-415-849-4204**. This ensures notification texts from Sales AI are recognized and not missed or blocked.
- **Set up email folders** for AI notifications to prevent important alerts from being buried in general inboxes.
- **Configure AI notifications:**
 - **Recommended:** Text notifications for interactions during operating hours; email notifications for after-hours interactions.
 - Email notifications can be used as a standalone option or in combination with text notifications, depending on user preference and operational needs.
 - **Note:** To change notification settings, contact an Impel admin.

B. Lead Follow-Up Workflows

- **Unresponsive Lead Workflow:**
 - Sales AI initiates immediate email and text outreach within 90 seconds of lead receipt, always pushing for an in-store appointment or phone consultation.
 - Dealer reps follow up with a phone call 5 minutes after lead receipt, referencing the AI's outreach and introducing themselves as the AI's partner.
 - If the customer declines a call, allow the AI to continue nurturing the lead.
 - 15 minutes after the call, send an email/text with 3-5 similar vehicles if applicable.
 - Continue with a structured cadence of calls, emails, and texts as outlined in the Impel Playbook, with persistent follow-up for up to 51 days.
 - At day 52, leads are moved to Lost status, and a re-engagement campaign is triggered by Sales AI.
- **Re-engagement Workflow:**
 - For leads that initially respond but then disengage, Sales AI uses open-ended, less aggressive questions to prompt re-engagement.
 - Dealer reps monitor and support as needed, following the cadence outlined in the Playbook.

C. Daily and Ongoing Responsibilities

- **Begin each day by reviewing overnight activity** and AI notifications, as a significant portion of leads engage after hours.
- **Prioritize appointments scheduled overnight** and verify vehicle availability.
- **Review and act on Sales Handoff conversations** promptly, especially when a phone call or human expertise is requested.
- **Check for trade-in information** provided by the AI and update customer records accordingly.
- **Always use the customer's preferred contact method** as indicated in the AI's conversation history.
- **Vary phone call times** and always leave a voicemail, referencing AI communications and following up with a text.

D. CRM Integration & Task Management

- All lead activity, follow-up tasks, and appointment details are tracked in VinSolutions CRM, following the Impel Playbook process.
- A custom VinSolutions process has been created specifically to align with the Impel Playbook. This process will assign tasks on certain days, providing context for Sales AI activity and clearly outlining the recommended next action steps for Internet Personnel to take.
- For any leads or appointments not automatically logged, staff must manually enter the information with the correct source attribution ("Impel - Sales AI").
- All personally identifiable information (PII) must be handled in accordance with Anderson Auto Group privacy and compliance policies.

E. Escalation Protocol

- Sales AI will alert staff for live handoff in the following scenarios:
 - Customer requests a live representative
 - Complex or nuanced questions that require human expertise
 - High-value or urgent opportunities are identified
- Respond to escalations promptly to ensure a seamless customer experience.

F. Knowledge Bank Updates

- If Sales AI cannot answer a nuanced or dealership-specific question, it may be possible to add this information to the Sales AI knowledge bank for future use.
- Only authorized Impel Admins (Trey Athay, Randy Athay, or Rob Kahla) may submit and update knowledge bank entries. Staff should escalate these requests to a designated admin.

6. AI Enablement, Disabling, and Logging Activity

- **Logging Activity:** Logging a phone call (whether contact or not), sending a text message, or sending an email from the end user will not disable Sales AI from continuing its outreach and nurture process.
- **Disabling AI:** To disable Sales AI for a specific lead, users must access the quick link provided within the notes section of the customer profile in VinSolutions. Disabling AI is not accomplished by simply logging activity.
- **Status-Based AI Control:** Certain statuses in VinSolutions (such as “Deposit Taken”) are recommended and can be used to automatically stop AI outreach. Custom statuses can also be implemented in the future to further refine AI engagement control.

7. Why AI Should Remain Enabled for Most Leads

Disabling Sales AI outreach should be rare and only done for specific, justified reasons. If a lead is disabled from AI outreach and the customer does not come into the dealership or becomes unresponsive, valuable follow-up opportunities may be lost. If AI is turned off and then reenabled, the system will only follow up if the customer re-engages with the AI; it will not automatically resume proactive outreach. This limits the effectiveness of the nurture process and can result in missed sales opportunities.

Additionally, when a conversation with a customer is logged (phone, email, or text), Sales AI does not have context for the content of those communications. If Sales AI reaches out after a prior interaction and the customer indicates they are already working with someone, the AI will recognize this and back off, stopping further communication. This ensures that customers are not overwhelmed, while still maximizing the chance to convert unresponsive or undecided leads.

8. Benefits & Expected Outcomes

- **Efficiency:** Sales AI ensures 100% lead follow-up, freeing staff to focus on high-value opportunities and reducing manual workload.
- **Conversion:** Persistent, personalized engagement increases appointment set rates and sales conversions.
- **Customer Experience:** Leads receive immediate, relevant responses 24/7, improving satisfaction and trust.
- **Productivity:** Staff can prioritize the most promising leads and avoid chasing unresponsive or low-quality opportunities.

9. Compliance

Strict adherence to this SOP is required. Bypassing Sales AI, duplicating outreach, or mishandling escalations undermines efficiency and the customer experience, and may result in corrective action.

10. Key Takeaways

- Sales AI is the first point of contact for all new internet leads.
- Staff should only intervene when prompted by the system or when a lead is escalated.
- The conversations can be monitored and are tracked in the VinSolutions CRM within the notes section of each customer profile.
- Knowledge bank updates are managed by designated Impel Admins.
- Focus your efforts on closing deals and building relationships with engaged, qualified leads.
- Consistent use of Sales AI ensures a professional, scalable, and efficient sales process across all Anderson Auto Group dealerships