

# FIND A DMS PARTNER THAT CHECKS ALL THE RIGHT BOXES.



## Start by asking the right questions.

When it comes to finding the right Dealer Management System (DMS) for your franchise dealership, one thing is likely: *you've got questions.*

This checklist includes questions you should consider when choosing the right technology to run your dealership.

- Start with section one and ask questions as a team, internally.
- Section two contains key decision-making variables to ask potential DMS partners before you make the switch.

Remember: Find the right-sized DMS partner who meets *your* needs, first.

## Section 01: Internal Decision Making



*Ask the following questions internally and get on the same page before your meet with a new DMS partner or sign another contract.*

### DMS STRUCTURE & FUNCTION

- ☐ Are we currently under contract with our current DMS provider?
- ☐ If so, what is our contract end date?
- ☐ How far out do we need to plan to make a change?

### INTEGRATION CAPABILITY

- ☐ How many third party vendors are we partnering with currently?
- ☐ How much are we paying in integration fees with our current DMS provider?
- ☐ If we switch to a new DMS, will we be able to integrate with our choice of third-party vendors?

### DMS DATA ACCESS & FEES

- ☐ Will we lose our customer data if we switch?
- ☐ Do we understand what data will and will not be available to be converted by our new provider?
- ☐ Is our data going to be secure, backed up, and available upon request with our new provider?

### USER WORKFLOWS

- ☐ Does our current DMS attract the next generation of new hires who are interested in developing their careers in technology-driven fields? (Or the opposite?)
- ☐ Is our current DMS limiting the potential candidates that we can hire?

## VALUE

- ☐ Do we currently pay a fair market price for our DMS technology?
- ☐ Is our DMS adding value to the work that we do?
- ☐ Do our reporting options provide actionable insights that help us run our business more effectively?

## SETUP & IMPLEMENTATION

- ☐ What organizational change management strategies would we need in order to deploy a new DMS?
- ☐ Are we prepared to evaluate and modify our existing dealership processes as part of implementing a new DMS?
- ☐ What process improvements are we currently evaluating throughout the dealership? How would a potential DMS change impact those plans?

## TRAINING & SUPPORT

- ☐ Does our current DMS provide valuable on-demand training materials and resources?
- ☐ Who on our team will manage on-boarding, training, and administrative tasks?

## Section 02: External DMS Vendor Evaluation



*Evaluate any potential DMS partner before you sign (or re-sign) a contract with the questions below.*

### DMS STRUCTURE & FUNCTION

- ☐ Is the DMS built on modern, cloud-based technology?
- ☐ How often is the DMS software updated and upgraded?
- ☐ Does the DMS provider offer security benefits, automatic backups, and options to protect our data?

### INTEGRATION CAPABILITY

- ☐ What is involved in the integration setup?
- ☐ Are there additional integration fees or charges for using a different brand's solution?
- ☐ Is there a discount for using certain vendors? Is there a fee either way?

### DMS DATA ACCESS & FEES

- ☐ Is their DMS built on modern cloud-based technology?
- ☐ Are there additional fees or charges to access our existing DMS data?

### USER WORKFLOWS

- ☐ Will our dealership be charged for additional licenses and users?
- ☐ Does their DMS have the ability to use modern customer preferences like digital documents and electronic signing?

- ☐ Is their DMS accessible from multiple browsers?
- ☐ Does this DMS support our reporting needs as a business?
- ☐ Does the DMS vendor safely and securely handle all of our customer and employee PII data?

## VALUE

- ☐ Can a new DMS software align our workflows and processes to increase profitability in a real, measurable way?
- ☐ Can this solution scale and grow with our business? Is it easy and straightforward to add additional rooftops and locations?
- ☐ Can partnering with a new DMS provider help our dealership reach our business goals with key performance management strategies?

## SETUP & IMPLEMENTATION

- ☐ Does this solution follow a proven process for integrating a new DMS?
- ☐ What project management tools and training options will help ease a technology transition?

## TRAINING & SUPPORT


- ☐ What is this solution's training, support, and change management philosophy? Does it match the values and expectations of our dealership?
- ☐ Does their DMS partnership include ongoing training beyond the initial installation?
- ☐ Is there a fee for additional licenses, new hires, and role changes to access training?
- ☐ If our team needs help, is access to support convenient and available?



Your dealership deserves a DMS that checks all the right boxes. Deciding what matters to your business will involve both internal and external discussions.

Knowing the right questions to ask will help you and your team determine the value of a potential vendor partnership. Take a step in the right direction and begin with this DMS checklist.

**Ask us today.**

**Dealertrack DMS**   
TECHNOLOGY THAT DRIVES YOU.