

CAR DEALERSHIP CRM SCORECARD

Score every CRM vendor on the same ten criteria. Give each vendor a score from 1 (poor) to 5 (excellent) on every row, multiply the score by the row weight to get its points, and add the points for a total out of 500. Change the weights to match your store, as long as they still add up to 100. Have the sales manager, the BDC manager and one salesperson score separately, right after each demo, then compare.

SCORECARD

Criterion	What good looks like	Weight	Vendor A score	Vendor B score	Vendor C score
Lead intake and routing	Every source lands in one pipeline with its source attached. Duplicates merge. Round robin, distribution lists and rules per rooftop, and a manager can get a copy of every lead a source delivers.	15			
Speed to contact	Texting and calling inside the lead record, delivery status on every text, call recording with transcripts, and an automatic first response the moment a lead lands.	15			
Follow-up automation	Multi step follow-up per lead type, scheduled texts, emails and voicemail drops, and a view of the whole team queue.	12			
Desking and deal flow	Cash, finance and lease payments from the lead record, with taxes, trade credit and lease methods handled, and a deal the customer can review and sign.	10			
Reporting and manager visibility	Activity by salesperson, outcomes by source, and a report a manager can read in the Monday meeting without building it first.	10			
Compliance and consent	A do not call list that blocks numbers, opt-out handling, recorded calls, consent capture, roles that limit who sees what, and encrypted customer data.	10			
Mobile use	A real phone app for the lot with texting, calling, the calendar, inventory and lead entry under the same login.	8			

Criterion	What good looks like	Weight	Vendor A score	Vendor B score	Vendor C score
Setup, data import and training	Import of existing contacts from common files, connected website forms, inventory with or without a feed, and training for every user from the first day.	8			
Contract terms and cost clarity	Term length, what it takes to leave, how users are added, and which charges depend on usage.	7			
Lead supply	Whether the vendor only manages the leads you already buy, or also delivers leads exclusive to your store.	5			
Weighted total (out of 500)	Score times weight on every row, added together. A perfect vendor scores 500.	100			

DEMO TESTS

Test	Ask the vendor to show	Vendor A (pass or fail)	Vendor B (pass or fail)	Vendor C (pass or fail)
The Saturday lead	A website lead arrives at 9:40. Show it landing, getting assigned, getting a first text and getting an appointment set.			
The untouched lead	Show what happens to a lead nobody works for 24 hours, and who gets told.			
The after hours call	A customer calls at 8:40 at night. Show where the call goes and where the message ends up.			
The do not call number	Add a number to the do not call list, then try to text and call it.			
The duplicate	The same shopper fills in two forms. Show the merge.			
The payment question	From the lead, build three payment options and send them to the customer.			
The departing salesperson	Switch a user off and show where their open leads and tasks go.			
The Monday report	Pull the past week of activity by salesperson in under a minute.			

IMPLEMENTATION QUESTIONS

Question	Vendor A answer	Vendor B answer	Vendor C answer
Which file types can we import our contacts from, and who maps the columns?			
How do our website forms connect, and how fast do those leads appear?			
Do we need an inventory feed or DMS access to start?			
Who trains our people, and how does a new hire get trained later?			
How are users added, and how does a manager add someone on a Saturday?			
What happens to a departing salesperson's leads and history?			
How do we cancel, and how much notice is needed?			
How does the CRM run alongside our DMS?			

COST PARTS

Cost part	What to ask	Vendor A	Vendor B	Vendor C
Base subscription	What is included, and what is billed separately?			
Users	How many logins are included, and how are more added?			
Setup and training	Is there a one time fee, and who trains new hires later?			
Usage based charges	How are bulk texting, email and voicemail deliveries billed?			
Integrations	Which connections carry a fee, and who charges it?			
Term and exit	How long is the term, how much notice does it take to cancel, and is there an exit fee?			

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