

CAR DEALERSHIP SOFTWARE STACK WORKSHEET

List every tool your store pays for, one row per category, then mark where two tools do the same job. Fill it in with the general manager, the controller and whoever runs internet sales, with the last three invoices from each vendor on the table. Decide keep, consolidate or replace for every row, and put every contract end and notice window on one calendar so renewals never decide for you.

STACK INVENTORY

Category	What it does	Tool you use today	Monthly cost and seats	Contract end and notice	Owner	Overlaps with	Keep, consolidate or replace
CRM	Leads, conversations, appointments, follow-up and sales reporting						
DMS	Inventory cost, posted deals, accounting, payroll, parts, service and title						
Inventory management	Photos, pricing, merchandising and feeds to the website and listings						
Listing sites and marketplaces	Inventory exposure where shoppers browse						
Texting	Two-way texts, bulk texts and texting campaigns						
Phone system	Store lines, call routing, recordings and voicemail						

Category	What it does	Tool you use today	Monthly cost and seats	Contract end and notice	Owner	Overlaps with	Keep, consolidate or replace
Call tracking	A tracking number for each ad or lead source						
Email marketing	Campaigns and drips to customer lists						
Website	The store site, inventory pages and the forms that create leads						
Website chat	Chat on the site and the leads it creates						
Landing pages	A page for each offer or campaign						
Lead programs	Leads delivered from campaigns or lead providers						
Paid search and social	Ads on search engines and social platforms						
Creative and design	Ad images, video and print pieces						
Desking	Payment options, trade, taxes and the deal the customer sees						
Credit applications	Secure applications, stipulations and lender shares						
F&I menu and contracting	Product menus, contracting and lender portals						
Reputation and reviews	Review requests and responses						

Category	What it does	Tool you use today	Monthly cost and seats	Contract end and notice	Owner	Overlaps with	Keep, consolidate or replace
Reporting and attribution	Leads and sales by source						
Scheduling	Appointment booking links						
Other	Anything that fits no row above						

OVERLAP CHECK

Job	Every tool that does it today	The one your team actually uses	Holds history you would miss	Action
Texting a customer				
Answering and routing calls				
Recording and reviewing calls				
Sending a vehicle to a shopper				
Assigning a new lead				
Reminding a rep to follow up				
Booking an appointment				
Desking a payment				
Taking a credit application				
Chatting with website visitors				
Building a landing page				
Making an ad or a print piece				
Reporting leads and sales by source				

CONSOLIDATION RISK

Question	Why it matters	Your answer
When does the contract end, and how much notice does it need to cancel?	Many contracts renew automatically. Miss the notice window and the decision is made for you.	
Is there an exit fee, and is it smaller than paying for both tools until the term ends?	Leaving early sometimes costs less than running two systems side by side.	
What data can you export, in which format, and does the history come with it?	Contacts without their texts, calls and notes lose most of their value.	
Is there a fee to export your data?	Know the cost well before the last month of the contract.	
What depends on this tool?	Website forms, phone numbers on printed ads, inventory feeds and links all need a new home.	
Who needs training, and when?	Train before go live. A tool nobody trusted on the first day rarely recovers.	
How long should the old and new tools overlap?	A short overlap protects leads already in flight.	
Which weeks should you avoid for the switch?	Month end, quarter end and your busiest selling weekends.	
Who signs off on the switch?	One owner per decision keeps the project moving.	
What will you measure after the switch?	Response time, appointments set and sold units show whether the change worked.	

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