



THE AI WORKBOOK FOR DEALERS

BEFORE YOU BUY THE ROBOT

Measure the problem. Map the process you actually run. Then change it — in that order. A working document for the person in your building who ends up owning this.

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WHY THIS ORDER

THREE STEPS, AND NONE OF THEM START WITH A DEMO

Nearly every failed AI implementation in a dealership fails the same way. Not because the software was bad — because the process underneath it was never written down. The tool exposed the gap; it did not create it. But the tool takes the blame, the contract does not get renewed, and the store walks away convinced this stuff is not ready for powersports.

"If you drop an AI lead-response tool into a store where three people all sort of handle internet leads, you haven't automated a process. You've automated confusion."

So this workbook runs in a fixed order, and the order is the point:

1	Measure the problem. One question, about twenty minutes. You cannot size a fix you have never measured.	20 min
2	Document the workflow you actually run. Honestly, on paper, embarrassing parts included.	1–2 weeks
3	Alter the workflow for AI. Decide what the machine takes, what your people keep, and how you will prove it worked.	Half a day

Steps one and two are free. Step three is where the money goes, and it is worth almost nothing without the first two.

STEP ONE

MEASURE THE PROBLEM

1 · PULL THE NUMBER

One question, fifteen minutes, and you will know more about your after-hours problem than any vendor demo will tell you.

THE QUESTION

What was our average response time to leads received between 6 p.m. and 8 a.m. over the last 30 days?

Where to find it — and why you probably can't

Do not start with your DMS. It runs units, parts, repair orders and accounting; nobody built it to timestamp a web lead. That is the first thing worth noticing: the system of record for your business has no opinion about the question.

Source	What it gives you	The catch
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Your CRM	A first-response or speed-to-lead report, if you have a real one.	It only counts replies logged in the CRM. Salespeople answering from a personal phone or Outlook and logging it later — or never — will flatter the number badly.
Your texting platform	Podium, Kenect and similar timestamp both sides of the conversation.	Best source you have, and it does not care whether anyone remembered to log it.
Your website or lead provider	When the lead arrived.	They cannot see when you replied. Half the equation — but the reliable half.

The manual version, which for most stores is the only version

Pull last month's after-hours lead notification emails. Note the time each one landed. Then find the first genuine reply: your sent folder, the text thread, the phone's call log. Three columns — received, replied, gap. Auto-responders do not count, and neither does a form confirmation.

Twenty minutes with a spreadsheet, and it is the most honest look at your store you will get this quarter. If that sounds primitive, sit with it. You are about to be pitched software that promises to optimise a metric your business currently has no way to produce.

The yardstick

The foundational research on lead response — Dr James Oldroyd's MIT / InsideSales study — found the odds of contacting a lead drop roughly 100-fold, and the odds of qualifying one about 21-fold, when the first attempt comes at 30 minutes instead of 5. Be straight about the caveat: that study measured contact and qualification, not close rate, and its behavioural dataset was small. But the shape of the curve is not in dispute. It is not a slope. It is a cliff, and it is at five minutes.

Which means the honest yardstick is minutes, not hours.

Your average	What it means
Under 5 minutes	You are at the ceiling. If you are hitting this at 11 p.m., something is already automated — and you should know exactly what it is.
5 to 60 minutes	Genuinely good for a human operation, and still past the cliff. Most of the contact advantage was gone before your reply went out.
1 to 14 hours	The next-morning reply. Common, defensible, and the reason your competitor sold that unit.
Over 24 hours, or unmeasurable	Software is not your problem. Ownership is. Fix step two of this workbook before you take a single vendor call.

Then ask the second question

Of the after-hours leads that got a next-morning reply, how many were already gone? Cross-reference against sold units. That is your actual cost — and it is the number you carry into every demo from here on.

2 · FOUR MORE NUMBERS WORTH PULLING

The response-time number sizes the problem. These four tell you where it lives, and all of them can be pulled before you spend a dollar.

1. When the leads actually arrive

Bucket last month's leads by hour of arrival. Most stores are surprised by how much of the week lands outside opening hours — and by the Sunday evening spike nobody staffs.

2. Substance, not just speed

Take your last twenty first replies. Count how many included a price, a payment figure, and an alternative unit. DAS Technology's 2025 lead-response study of 1,700 dealerships found 61 percent now answering inside 15 minutes — genuinely better than a few years ago — but 74 percent never included a price, 91 percent left out payment information and 89 percent offered no alternative unit. Speed is getting solved. Substance is not.

Source: DAS Technology 2025 Lead Response Study, 1,700 dealerships, Q3–Q4 2024. Car-dealer data, collected by a company that sells lead-response software: directionally useful, not gospel, and not powersports. Run your own count of twenty — it takes an hour and it is your store.

3. The dead-lead count

Ask your CRM for the number of leads created in the last 24 months with no activity in the last 90 days. That is inventory you have already paid for. Most stores have never seen the figure, and it is usually into four digits.

4. Appointments set, not messages sent

Pick the number you will judge any tool against, before you meet any vendor. Messages sent is a vendor metric. Appointments set — and kept — is a store metric.

Worksheet: your baseline

Measure	Your number	Pulled from	Date
Average after-hours first-response time (30 days)			
Share of leads arriving outside opening hours			
Of 20 first replies: how many included price			
... included a payment figure			
... offered an alternative unit			
Dead leads in CRM (no activity 90+ days)			
Appointments set last month			

After-hours leads that got a next-morning reply and bought elsewhere

LOCK THIS PAGE

Date it and keep it. Six months from now it is the only thing standing between you and a vendor dashboard that grades its own homework.

STEP TWO

DOCUMENT THE WORKFLOW YOU ACTUALLY RUN

3 • WHY THIS IS THE WHOLE JOB

A workflow is who does what, in what order, and what triggers the next thing. Defining yours — honestly, on paper, embarrassing parts included — is the single biggest step in understanding what an AI tool will do for you.

Bringing AI into the sales funnel almost always means rethinking the process, not bolting something onto it. And you cannot tell what a new diagram breaks if you never wrote down the old one.

Who writes it

- **Not the vendor.** They will offer, and they will be helpful, but a vendor maps your process through the lens of the product they sell.
- **Not a consultant, alone.** An outsider can ask the annoying questions; they cannot tell you what really happens on your floor on a Saturday.
- **Somebody inside the building, by name** — usually the GM or sales manager — before go-live and after.
- **One caution:** be careful handing the map to the person whose department looks worst if the map is honest. That is not a character judgment. It is human nature.

How to build it

Walk one lead end to end with three people: your internet lead person, your top producer, and a newer salesperson. You will find gaps in twenty minutes.

"Your top producer has quietly been running a better process than the one on paper — and that's often the one worth scaling."

4 • WHAT GOES ON THE MAP

Start with every door a lead can come through. Then answer the eight questions for each one.

The doors

Phone · website form · website chat · text · marketplace (Cycle Trader, ATV Trader, and the rest) · OEM referral and dealer locator · social message · service lane · walk-in · repeat and referral.

The eight questions, per door

1. **Who touches it first?** By name or by role, not "whoever's around".
2. **Who touches it second, and when?** Including nights, weekends and days off.
3. **What triggers the handoff?** What has to be true before it moves.
4. **How fast is the response supposed to be?** The real standard, not the poster.
5. **What does "worked" mean?** Touches, channels, over how many days.
6. **Which system holds the record?** And who is responsible for entering it.
7. **Who declares a lead dead?** And where does it go after that.
8. **Who keeps this document true?** Processes drift. Somebody owns it after go-live.

Worksheet: one row per door

Door	First touch	Second touch / after hours	Handoff trigger	Standard	System of record
Phone					
Website form					
Website chat					
Text					
Marketplace					
OEM referral					
Social message					
Service lane					

What a finished map looks like

- Four pages, roughly. Boring. Almost nobody has one.
- It names people, not departments, for first and second touch.
- It says what happens at 11 p.m. on a Tuesday and 10 a.m. on a Saturday, specifically.
- It includes the shadow process — what your top producer actually does that is not written anywhere.
- It has one named owner and a review date.

THE TEST OF AN HONEST MAP

If nobody winced while you wrote it, it is not finished. The parts that are uncomfortable to write down are the parts a tool will either fix or expose within a fortnight.

STEP THREE

ALTER THE WORKFLOW FOR AI

5 - THE DIAGRAM SOMEBODY IS GOING TO HAND YOU

The shape is always about the same, and it is roughly where this is heading.

- 1. **AI takes the lead the moment it lands** — qualifies, answers the question, schedules, follows up.
- 2. **A sales manager makes first human contact** and structures the deal.
- 3. **The right salesperson** — not the next one up — takes it from there and closes it.
- 4. **The BDC stops being a lead-triage desk** and becomes a retention desk: equity opportunities, service-to-sales, relationships that outlast the unit.

READ THIS BEFORE YOU HANG THAT DIAGRAM IN THE SALES OFFICE

A manager taking first human contact, and the right salesperson getting assigned instead of the next one up, is not a workflow tweak. That is the end of the up system as most stores run it. You cannot spring that on people who have not been told it is coming.

6 - HAND OVER, OR GUARD

Decide this line deliberately, in writing, before a vendor decides it for you.

Hand to the machine	Keep with your people
After-hours first response on every channel	Knowing when to push and when to back off
Form, chat and text triage	Reading what the customer is not saying
Follow-up sequences and CRM reactivation	The trade walk-around and the first-bike conversation
Price, payment and availability lookups	Structuring the deal
Appointment scheduling and reminders	Talking rides, and the relationship after the sale
Logging the activity nobody logs	Deciding a lead is dead

Rules for the machine layer

- **Substance, not just speed.** A fifteen-second reply that skips price, payment and alternatives does not close anything by itself. Write the minimum content of a first reply and hold the tool to it.
- **Ownership is assigned at first touch.** "The system has it" is how a customer ends up owned by nobody.
- **Escalation triggers are explicit.** Trade-in mentioned, financing question, second unit, service complaint, any sign of frustration — a human takes it now, not at the end of the sequence.
- **Stop conditions.** The sequence ends when a human replies, when an appointment is set, or on request. Nothing keeps texting someone who has already walked in.
- **Tone QA, weekly.** Somebody in the building reads twenty machine messages a week out loud. If it reads like a robot, it is costing trust.
- **One voice.** Configure it to sound like your store, not like a template with your logo on top. Optimising toward sameness is how your differentiator gets averaged away.

7 · YOUR PEOPLE ARE GOING TO FEEL THIS

Old-school salespeople resist this, and the reflex is to write them off as dinosaurs. Don't — because two very different things sound the same coming out of the same mouth.

"He isn't being difficult. He's doing your quality control for free."

Useful resistance	Unhelpful resistance
Names a specific thing: this one went out too fast, this one went to the wrong customer, the scoring says she is ready and she isn't.	Stays general: I've always done it this way.
Fix the configuration. This is free QA from someone who has sold units since before your website existed.	No setting you change will answer it. This is a management conversation, not a software one.

And answer the question nobody asks out loud: is this here to replace me? Every salesperson on your floor is wondering. If you do not answer it, they will answer it themselves and quietly work around the tool — leads worked off a personal phone, notes that never reach the CRM. That is not sabotage, it is self-preservation, and it wrecks your data on the way through.

8 · ROLL IT OUT IN THREE MOVES

Window	Do this	Prove it with
First 30 days costs nothing new	Pull the real dead-lead count. Switch on after-hours response on one channel. Measure current first-response time honestly.	The baseline worksheet on page 4
60–90 days prove it on one thing	Run a single reactivation campaign against the dead-lead list. Add price and payment detail to auto-replies. Assign ownership at first touch.	Appointments set, not messages sent

6–12 months scale what worked	Every inbound channel. Matched routing instead of next-up. A closed loop from lead through to a delivered unit in the DMS.	Units delivered by lead source
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9 · HOW WILL YOU TELL WHICH KNOB YOU TURNED?

This is where strong tools fall apart — not at deployment, at measurement. Most of them are islands. Each reports on itself, using its own definitions, and each is very confident it deserves the credit.

Your lead tool says response time dropped 80 percent. Did that turn into units? Your chat tool counts a conversation as an engagement. Your CRM counts that person as a lead. Your DMS does not count them until they sign. Three systems, three numbers, one human being who came in looking for a side-by-side.

"Speed gets you the conversation. Your process gets you the deal."

Write the definitions down first

Word	What the tool means by it	What your CRM means by it
Lead		
Contact		
Engagement		
Worked		
Dead		
Appointment		

If those columns do not match, every report you receive for the next two years is comparing two different things, and the disagreement will be settled by whoever is most confident in the meeting.

The attribution question no dashboard answers

Your response tool got to the customer in four minutes. Your manager structured it right. Your salesperson knew the unit cold and followed up on a Tuesday when nobody told her to. One of those closed it, or some combination did — and the tool that touched it first is the only one keeping score. That is not an argument against the tool. It is an argument for knowing your process well enough to tell the difference. If you cannot, you will renew the wrong contract and coach the wrong behaviour, and both will feel like they are working.

10 · BEFORE YOU SIGN

Five questions for any AI vendor

- 1. **Does this connect to my CRM — both directions?** If it only reads and never writes back, you cannot follow a lead through to a delivered unit.
- 2. **Can I export my own data, in full, without calling support?** "We'll run a report for you" is not data access.
- 3. **How does this tool define a lead, a contact and an engagement?** Write the answers down. Compare them to how your CRM defines the same three words.
- 4. **When this tool touches a lead, who gets the credit — and can I change that rule?** If the answer is baked in, it will fight your comp plan.
- 5. **Who configures it after go-live — you or me?** Somebody in your building needs the keys, or every tweak becomes a support ticket.

AND THE ONE THAT DECIDES IT

Can I bring my other data in — so I can overlay spend, lead source, salesperson and close rate, and decide for myself? If the answer is a shrug, or "our dashboard shows you everything you need", understand what you are buying. That is not a measurement system. It is a vote of confidence.

Go / no-go checklist

Done	Before you sign anything
	Baseline worksheet completed and dated
	Workflow map written, all doors covered, named owner
	Hand-over line agreed in writing: machine versus people
	Escalation triggers and stop conditions defined
	The floor has been told what is coming, and why, and what it means for them
	Definitions sheet filled in for both systems
	The single number you will judge this on, chosen in advance
	Vendor answered all five questions, in writing

"To AI or not to AI was never really the question. The question is whether you know your process well enough to change it, whether your people are coming with you, and whether you'll be able to prove any of it six months from now."

Define who does what. Name who owns it. Bring your team along. Then buy the tool.

SOURCES AND CAVEATS

Lead-response curve: Dr James Oldroyd, MIT / InsideSales — measured contact and qualification, not close rate, on a small behavioural dataset. Response-quality figures: DAS Technology 2025 Lead Response Study, 1,700 dealerships, Q3–Q4 2024 — car-dealer data, collected by a company that sells lead-response software, directionally useful and not powersports. Where this workbook gives a number, run your own version of it before you rely on it.

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