AGENT LEADERSHIP GUIDE

Integrated eContracting is Just eContracting – **But WITH the Benefits of an Integrated Dealership System**

PEN connects a Provider to a network of Dealer Systems including DMS, Menu, and Specialty Software Applications.

The technology enables a streamlined and seamless sales process by integrating the Provider's System with the Dealer's Point of Sales System.

Integrated eContracting **FUNCTIONS**

eRATING
Dealers use their DMS, Menu or Specialty Application to receive accurate, real-time product eligibility and pricing from the Provider directly into their software. **Pricing is automatically calculated without rekeying deal data.**

eCONTRACTING
Aftermarket product eContracting complements the Provider's System by eContracting in the Dealer's System. The correct forms are sent by the Provider to the Dealer's System and are automatically registered in the Provider's Portal.

APPROVAL
Live or booked contracts are automatically available in the Provider's Portal for Dealer approval. There is no change to the Provider's remittance procedures.

AGENTS Provide Important LEADERSHIP for Dealers

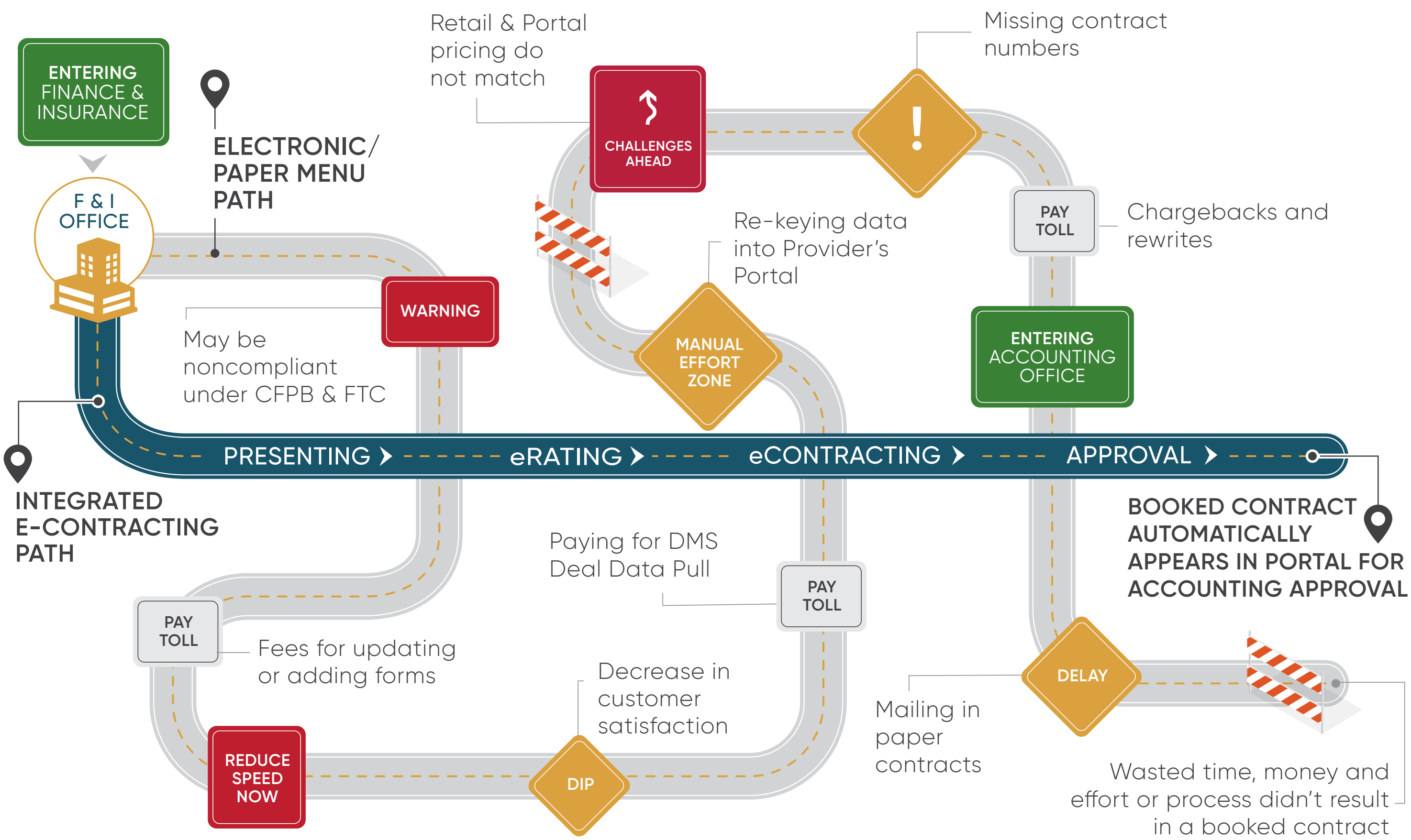
DEALERS WANT AGENTS TO BE THEIR:	VS	DEALERS NEED AGENTS TO GUIDE THEM THROUGH
• way to increase the number of products sold • Tech Support • Trainer		• all the new technology available to help facilitate the F&I process • the implementation of a new system and process

BE PROACTIVE

Most successful Agents operate on their toes, not their heels. How? Start by having a conversation with your Dealers to evaluate what their current F&I process looks like and where the Dealer wants to go. By understanding where the inefficiencies are, you're in a better position to advise and lead Dealers to make incremental improvements towards a streamlined workflow.

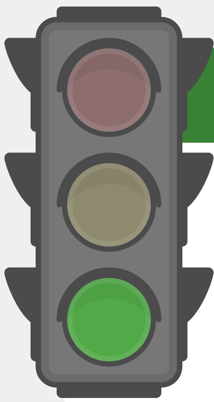
A Dealer's eRating & eContacting PROCESS

A Dealer's F&I workflow is often littered with roadblocks, leading to slowdowns that cost time and money. Where are your Dealer's pain points that detour them away from a streamlined process?



Dealers are Supported by their Software System Provider

HOW A DEALER GETS SOFTWARE SYSTEM SUPPORT



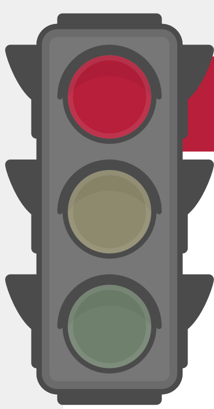
GET YOUR DEALERS TO

- Contact their software system **FIRST** for support issues
- If a Dealer calls you with technical questions, tell them to contact their software system

STOP BEING YOUR DEALERS TECH SUPPORT

A Dealer's FIRST call, EVERY TIME, should be to their Dealer System Provider. Everyone wants to help but whether the issue is technical, training or something in between, if a Dealer calls you instruct them to contact their software system.

Having the Dealer call their system first is the quickest, most efficient way to a resolution, reinforces best practices and reduces the number of panicked phone calls you will get.



STOP YOUR DEALERS FROM

- Calling you for help
- Calling their Provider for help
- Delaying resolution to their issues

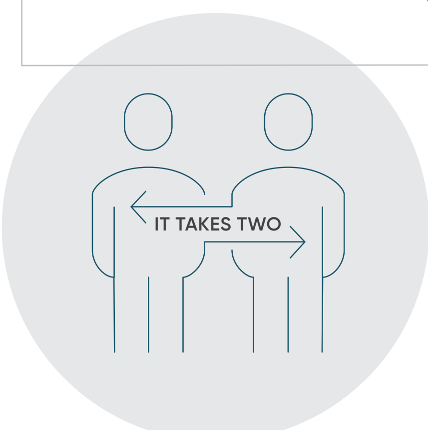
What **Situation** Is Your **Dealer** In?

WHERE THEY ARE DETERMINES YOUR LEADERSHIP APPROACH

Your role is to direct, delegate, coach or support Dealers depending on which stage of change they are in. Just like a coach wouldn't deliver the same speech to his or her team before and after a game, so should you adjust your approach to Dealers given their situation. From helping explore technology options, to assisting them through a system setup, to holding them accountable to their committment to change, your conversations and guidance should correspond to the Dealer's status.

PLANNING

Helping a Dealer make good F&I process decisions requires focused preparation. This is a way to explore options and opportunities to implement solutions that result in a sustained change. Whether the change is a new system, new product or a move to eContracting, an effective Agent will make sure the Dealer has an agreed upon plan and the tools needed to transition.



IMPLEMENTATION

Agents need to coach Dealers that implementation is really about change management. System setup does not equal implementation. How people are on-boarded to the new process is crucial for success.

Provider Setup

A Dealer needs to be setup in the Provider's System, meet all the Provider's requirements, and (sometimes) be activated for integration.

Dealer System Setup

Almost all system setups are initiated and completed by the **DEALER** calling their software vendor.

MAINTENANCE

Continue talking with Dealers to determine if the process "stuck" or if they went back to their old ways. Instead of asking broad questions like, "How's it going?" ask specific questions like:

Are the menus presenting correctly for all F&I Managers?

Are all the products registered for Integration?

Are you contracting for every deal?

Do all F&I Managers know how to void contracts?

Remember to also visit the **Accounting Office** to fully reconcile the first month and identify non-remitted contracts.

Let **Us** Help You, Help Your Dealers

PEN does NOT have access to a Dealer's software and therefore can NOT assist in the Dealer setup process or handle technical support issues. **Dealers contact their Software System for support.**

However, we can help you navigate Integrated eContracting setup and help you coach Dealers through the process.

HOW CLIENT SERVICES CAN HELP YOU

Educational Materials

- Videos, Demos, Webinars, other collateral

How to talk to your Dealers

- How to start a conversation with Dealers about their technology
- How to evaluate a Dealer's current F&I process

Prep & Setup Materials

- Pre-Setup Checklists
- System Setup Guides
- System Demos

Customized Resources

- Collateral customized to your Provider(s)

Evaluate Internal Processes

- Discuss your current client on-boarding methods

WE'VE **GOT YOUR BACK.**

Contact us to discuss how we can help you, help your Dealers

VISIT www.ProviderExchangeNetwork.com/agency-services/

CONTACT US https://www.penrc.com/contact-us