Rate Your Tech Stack – By Department
Presented by Blackpurl at NATDA 2022

Sales

Question		Tech Platform to Consider	Points
Does your sales team have a Customer Relationship Management software (CRM) to prompt and guide follow up and lead management?	If **No**, add 1 point	A cloud-based CRM to empower your team to be more systematic in sales	——————
Can you easily track the total cost of a trailer? *(including freight and reconditioning)*	If **No**, add 2 points	A VIN-centric dealership platform to unify all of your parts, service, and sales operations	——————
If you have a website: does your online inventory accurately reflect your real inventory at all times?	If **N/A**, no points If **No**, add 2 points	A trailer-friendly website that can connect to your dealership platform and display an accurate view of all available inventory. Sales are auto-removed.	——————
Can your sales team easily communicate with customers through chat and text?	If **No**, add 1 Point	Texting and chat platform for your sales team and/or your website	——————
Bonus: Do you have a .com domain with coordinated email addresses?	If **Yes**, -1 Point		——————
		Total from Sales (–1 to 6 possible)	——————

Service

Question		Tech Platform to Consider	Points
Can the service manager easily see the status of all jobs in real-time?	If **No**, add 1 point	A dealership platform that provides visibility to the service manager	——————
Are you tracking technicians' performance using job clocking?	If **No**, add 1 point	A time clocking system – ideally built into your dealership platform that will help you decrease the cost of the labor you sell. And, go faster	——————
Can a customer schedule a service appointment with you in 60 seconds or less?	If **No**, add 2 points	At minimum, a free calendar platform like Google Calendar. Ideally, an integrated or built in service scheduler linked to your dealership platform	——————
Is your team using an all-paper process for work orders?	If **No**, add 2 points	At minimum, something like an Excel template – ideally a mobile-friendly dealership platform	——————
Bonus: Is your team using an internal messaging system like Slack or Teams to communicate?	If **Yes**, -1 Point		——————
		Total from Service (–1 to 6 possible)	——————

Total from this page	——————

Parts

Question		Tech Platform to Consider	Points
Does your dealership platform contain all of the part numbers your suppliers offer? (both stock and nonstock available parts)	If **No System**, add 2 points If **No**, add 1 point	A dealership platform that accepts/auto-updates supplier's files; create a relationship with your suppliers and obtain price files	——————
Are you selling trailer parts and accessories online today?	If **No**, add 1 point	An Ecommerce platform (such as Shopify or WooCommerce)	——————
Do you truly know exactly how many of each part you currently have and where they are located?	If **No**, add 2 points	A dealership platform/POS that provides location tracking and part counting utilities	——————
Can you price parts dynamically by price range (matrix pricing)	If **No**, add 1 Point	A dealership platform that allows "Matrix Pricing"	——————
Integrated credit card processing	If **No**, add 1 point	Merchant services connected to system	——————
Bonus: Do you currently print labels for parts or use a barcode scanner?	If **Yes**, -1 Point		——————
		Total from Parts (-1 to 7 possible)	——————

Management

Question		Tech Platform to Consider	Points
Do you have a dealership platform, point-of-sale system, or other electronic database for the dealership?	**Paper-only,** add 3 pts. **Generic POS,** add 1 pt. **Full platform,** -1 pt.	From *spreadsheets and Gmail* to basic accounting systems to full dealership platforms	——————
Can management see the size of the current deal pipeline?	If **No**, add 1 point	A cloud-based CRM	——————
Can the ownership team quickly and easily access an Income Statement & other accounting from anywhere?	If **No**, add 1 point	Cloud-based accounting platform like QuickBooks Online or Xero	——————
Within your dealership platform or POS, can you customize reports?	If **No**, add 2 points	A system with customizable reporting	——————
Bonus: Is your team using other accounting-connected apps? (like *Rental* or *Manufacturing* Apps)	If **Yes**, -1 Point		——————
		Total from Management (-2 to 7 possible)	——————

Total from this page   ——————

Add your points here: Front _____ + Back _____ = **Total _____**

5 or fewer points: Leader
6-14 points: Some opportunity
15-23 points: Lots of opportunity

You can download this worksheet from Blackpurl.com/NATDAtalk *to use or modify for your operation.*