Future-Proofing Your Tech Stack

NATDA 2022

Today's Session

- ■ What is a Tech Stack?

- ■ Notable Customer Trends

- ■ Rate Your Stack

- ■ How to Build a Tech Stack

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A few questions…

What is a **tech stack**?

Definition

The technology platforms on which your business runs, in order of priority

Notable Consumer Trends

Ecommerce

According to [McKinsey](#):

McKinsey & Company

- ○ "Credit and debit card data revealed a nearly 20 percent increase in online spending since January 2020, and this pandemic-induced surge in ecommerce was no hiccup."

- ○ "The digital future is here to stay. Some 92 percent of consumers who tried online shopping in 2019 became converts, cementing an emergency response into an indispensable habit."

- ○ "Ecommerce also redefined convenience, with even traditionally tactile shopping experiences such as grocery shopping enjoying a notable surge.

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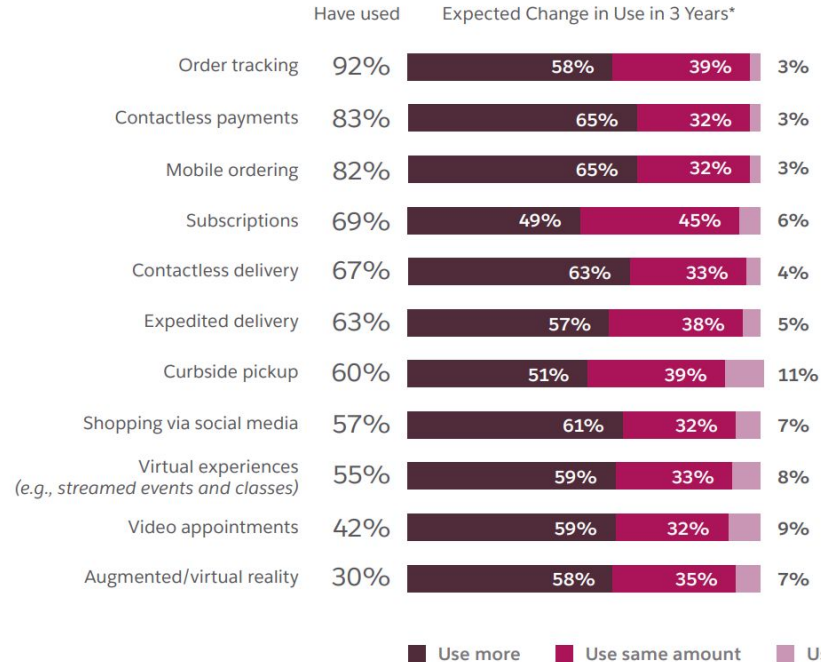**blackpurl** | **NATDA** A RESOURCE FOR TRAILER DEALERS

Ecommerce

Customers want to be able to buy both trailers and parts online.

- See, buy, and sign online

- Industry working toward this

- Major mainstream options available, like Shopify and WooCommerce

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Hybrid Experience

Use and Expected Use of the Following Technologies/Services

	Have used	Expected Change in Use in 3 Years*			
Order tracking	92%	58%	39%		3%
Contactless payments	83%	65%	32%		3%
Mobile ordering	82%	65%	32%		3%
Subscriptions	69%	49%	45%		6%
Contactless delivery	67%	63%	33%		4%
Expedited delivery	63%	57%	38%		5%
Curbside pickup	60%	51%	39%		11%
Shopping via social media	57%	61%	32%		7%
Virtual experiences (e.g., streamed events and classes)	55%	59%	33%		8%
Video appointments	42%	59%	32%		9%
Augmented/virtual reality	30%	58%	35%		7%

■ Use more ■ Use same amount ■ Use less

Source: *State of the Connected Customer by Salesforce, 5th Edition, 2022*

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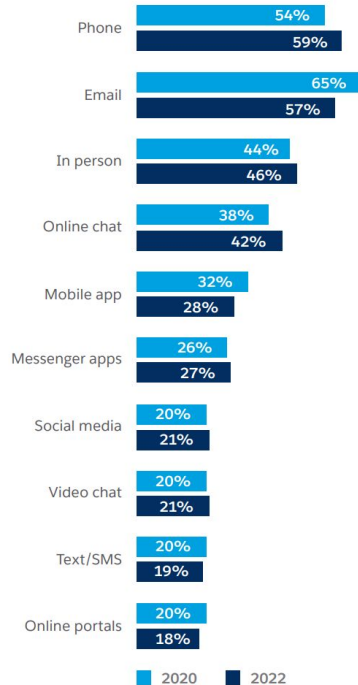
* Base: Customers who've used the technology/service.

Hybrid Experience

The modern trailer customer want technology-driven interactions that supplement the brick-and-mortar store experience.

- Online service scheduling

- View inventory online

- Communication through email, text, and phone

- Hybrid Selling Models (ie. reserve online, pickup in-store)

Multi-Channel Communication

Customers Who Prefer the Following Channels

Channel	2020	2022
Phone	54%	59%
Email	65%	57%
In person	44%	46%
Online chat	38%	42%
Mobile app	32%	28%
Messenger apps	26%	27%
Social media	20%	21%
Video chat	20%	21%
Text/SMS	20%	19%
Online portals	20%	18%

■ 2020   ■ 2022

Base: Customers who use the indicated channels.
Maximum of three preferred channels accepted.

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Organization Expectation

I expect companies to anticipate my needs

56% — 2020
62% — 2022

Source: *State of the Connected Customer by Salesforce, 5th Edition, 2022*
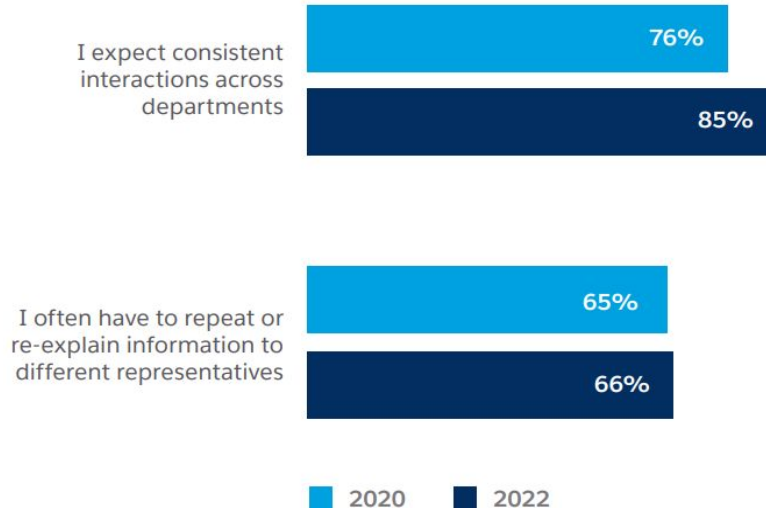
Organization Expectation

Modern customers **want you to know** what is going on at all times.

- Customers expect your staff to be able to quickly and easily access their "file" with all of their unit ownership and service history information

- Quickly reference in-progress service jobs and unit deals

- Customers expect it to be easy to determine other information during communication like appointment availability and part pricing

Organization Expectation

Rising Expectations for Consistency Remain Unmet

Customers Who Say the Following

I expect consistent interactions across departments
- 2020: 76%
- 2022: 85%

I often have to repeat or re-explain information to different representatives
- 2020: 65%
- 2022: 66%

■ 2020   ■ 2022

60% of customers say it generally feels like they're communicating with separate departments, not one company

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Automation

Customers want good service;
automation may be a key answer.

- CRM and other marketing tools offering automated communication

- Connect the flow of information with app connectors like Zapier

- Semi-automatic communication within software

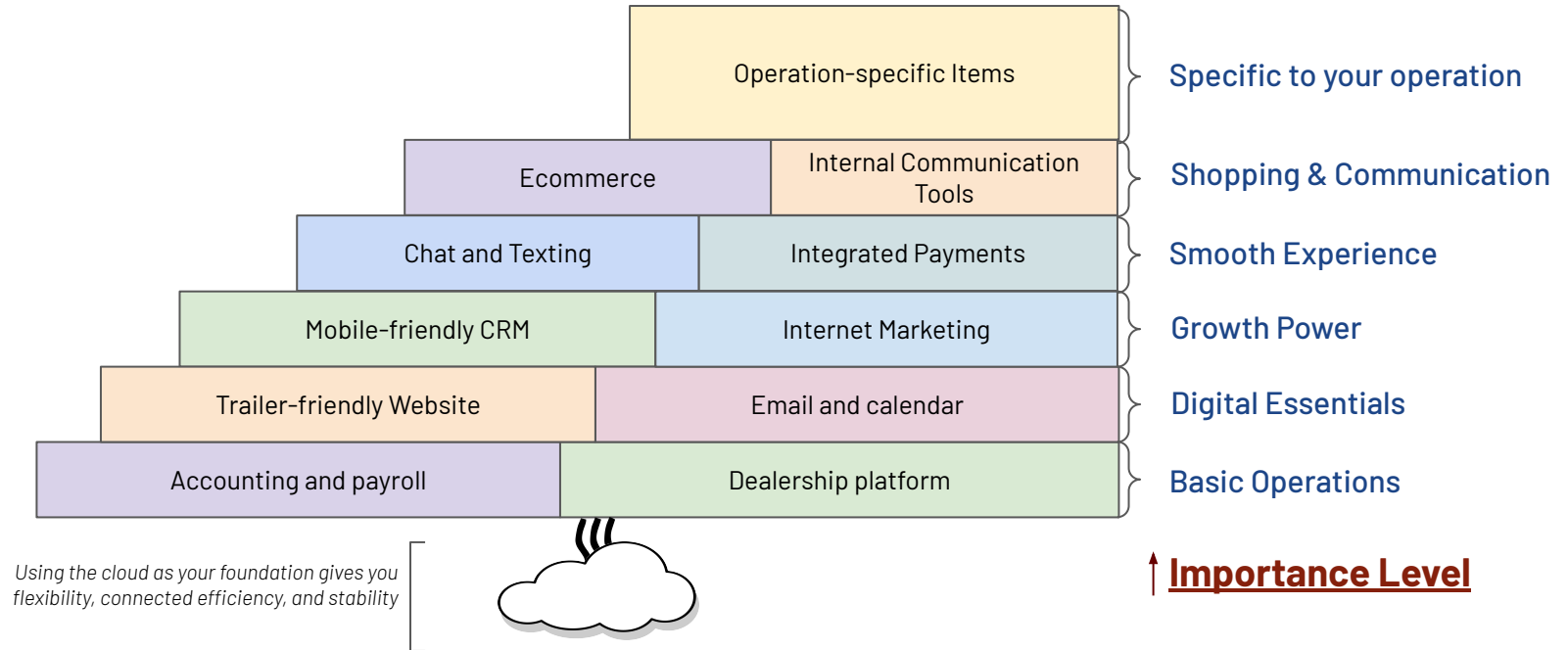- According to Tesla: Robots

Business Trend: Connected Financials

Business owners are increasingly asking for better-connected accounting and finance software.

- Use financial reports on your phone in real-time

- Bank and card feed integrations that save accounting time and cost

- Use industry standard software with app stores to connect and improve operations

- Software made for the dealership industry that automatically integrates with mainstream tech so regular users never have to mess with a financial app
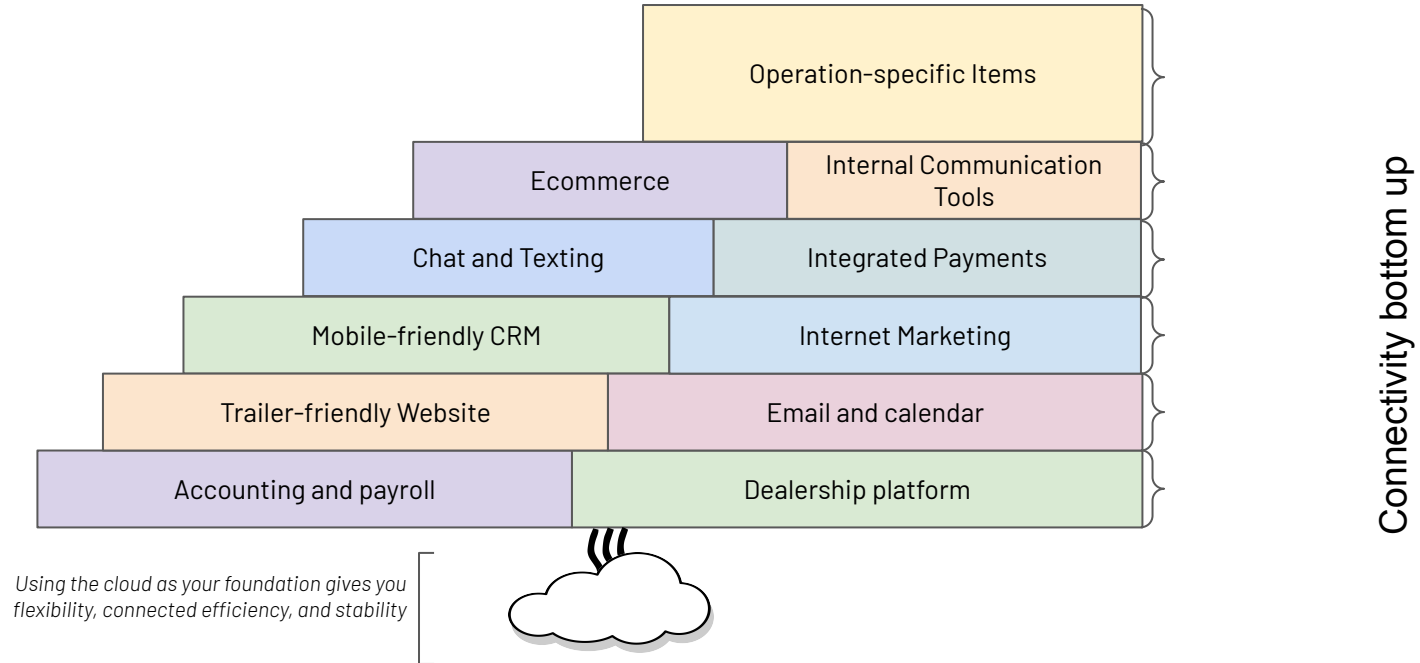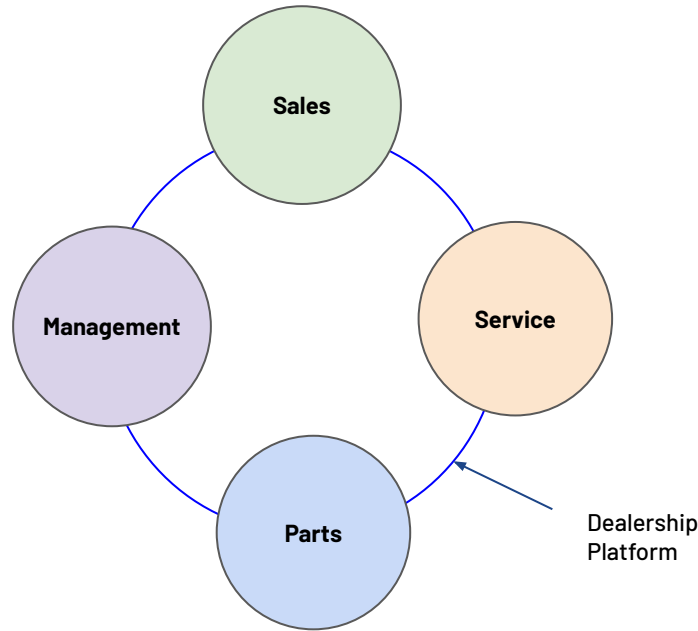
Building a Tech Stack

Building a Tech Stack

	Importance Level
Operation-specific Items	Specific to your operation
Ecommerce / Internal Communication Tools	Shopping & Communication
Chat and Texting / Integrated Payments	Smooth Experience
Mobile-friendly CRM / Internet Marketing	Growth Power
Trailer-friendly Website / Email and calendar	Digital Essentials
Accounting and payroll / Dealership platform	Basic Operations

Using the cloud as your foundation gives you flexibility, connected efficiency, and stability

↑ **Importance Level**

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Connectivity in Your Stack

Operation-specific Items

Ecommerce | Internal Communication Tools

Chat and Texting | Integrated Payments

Mobile-friendly CRM | Internet Marketing

Trailer-friendly Website | Email and calendar

Accounting and payroll | Dealership platform

Using the cloud as your foundation gives you flexibility, connected efficiency, and stability

Connectivity bottom up

Connected Foundation

Sales

Service

Management

Parts

Dealership
Platform

Stack Eval Worksheet

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)	-------

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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)	------

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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		_____
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)	_____

Next Steps

1. **Create an evaluation team**
   - Be on the team yourself
   - Be clear how decisions will be made

2. Analyze the opportunity in each section (use worksheet)
   - Involve as many of your team as possible

3. Decide the next step in your evolution of each area

4. Research and choose solutions, assigning specific task owners
   - Start small, make sure technology can connect, eliminate duplicate data entry
   - Great software is out there, turn to a number of resources like NATDA, G2, Source Forge

5. Implement new solutions and give your stack a new grade

Contact Us

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![NATDA Trailer Show — DEALER EVENTS — Aug 31 & Sept 2 | natda.org/trailer-show](image)

Wounded Warrior Project Keynote Luncheon

Wednesday, August 31
12:00 pm – 1:45 pm
Location: Grand Ballroom C

Join Wounded Warrior Project for a lively lunch with show attendees, exhibitors and a presentation from this year's keynote speaker, Sal Gonzalez. Gonzalez is a Marine Corps veteran, "America's Got Talent" contestant and a Warriors Speak spokesperson who will share his incredible story. The event is an amazing opportunity to relax with industry peers, get inspired, and show your support for military veterans in the trailer industry.
(Tickets are required for this event.)

Dealer Happy Hour

Wednesday, August 31
5pm – 6:30pm
Location: Davidson Ballroom

Unwind from a full day of learning with entertainment, drinks and appetizers before heading out on the town in Nashville.

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Ultimate Prize Package Raffle & New Product Giveaway

Friday, September 2
11:00 am
Location: Exhibit Hall, Dealer Lounge

We're raffling off our Ultimate Prize Package to one lucky dealer attendee... And all you need to do is donate to our selected charity this year, Wounded Warrior Project! Stop by the Dealer Lounge to donate, check out the New Product display, and vote for your favorite new product. A winner will be chosen for each of the eligible new product entries eligible and ONE big grand prize winner will walk away with the Ultimate Prize Package! You must be present to win. Terms and conditions apply.

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