Auto/Mate®
by DealerSocket

AUTO/MATE DEALERSHIP SYSTEMS

THE AUTO DEALER'S 10-STEP GUIDE TO
USING MOBILE TABLETS

in Sales, Service and F&I

Introduction

Approximately 40 percent of auto dealerships currently use mobile tablets in one or more department, according to a 2019 survey of dealership employees conducted by Auto/Mate. Considering the many benefits mobile tablets have to offer, this is a surprisingly low percentage.

The primary reasons auto dealers haven't yet adopted mobile tablets include:

Cost. The hardware and software costs associated with implementing mobile tablets is not prohibitive, but the costs associated with expanding the network infrastructure so tablets can be used effectively may be a factor.

Change. Mobile tablet usage requires a change in some processes, and as we know, many people are resistant to change.

ROI is undefined. Historically, dealers don't adopt new technologies until the return on investment is clear.

Despite the slow rates of mobile tablet adoption, dealers do recognize the potential benefits, including:

- Improving dealership efficiency/workflow/consistency in process
- Speeding up processes
- Making dealership personnel jobs easier

- Increasing customer satisfaction
- Reducing paperwork
- Increasing revenue
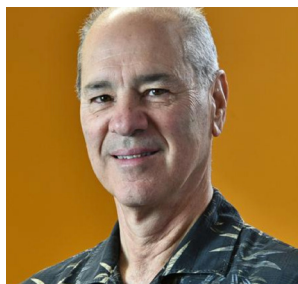
Before investing in mobile tablets, it's good to know the many considerations involved that can make or break the successful adoption of this exciting new technology.

The goal of this eBook is to guide auto dealers through the process of selecting, implementing and using mobile tablets throughout the dealership.

I hope you find the recommendations in this eBook helpful. As always, I welcome your feedback and suggestions at *mesposito@automate.com*.

Sincerely,

Mike Esposito
President & CEO
Auto/Mate Dealership Systems

> "Using this type of technology will increase your retention numbers which is what the manufacturers are constantly hounding every dealer in the market for.

- Trevor Shoun
Price Automotive Group

1 Perform a Needs Analysis

Before implementing any new technology, take the time up front to perform a needs analysis. This process results in fewer frustrations and less money wasted.

The first step is to figure out how your staff will be using the tablets. Each department manager should answer the following questions:

- Which applications do you want to use on your mobile tablets? In service, do you want to use them for writing ROs, or do you also want to conduct multi-point inspections and parts inquiries? In F&I, do you want to conduct menu presentations? Create a list of desired applications in each department.
- Do you want to buy tablets that can be used to replace PCs or as an additional device to be used depending on the task?
- Which web browsers are compatible with your OEM websites and applications? Ideally, you want your tablet to support an interface to your OEM as well as their mobile apps.
- Are you happy using the touchpad keyboard, or would you like the option of adding a snap-on keyboard? Everyone assumes that you can just point and click with a tablet, but there are times when information has to be manually typed in.
- Will your OEM, DMS and other vendors be requiring you to use any mobile apps in the next few years?

Once you have the answers to these questions, talk to other dealers about their experience with mobile tablets. Bring it up in a 20 Group, at conferences and contact dealers you know to find the answers to these questions:

- Did mobile tablets make your staff more productive?
- Did mobile tablets increase customer satisfaction?
- What did you wish you knew before you adopted mobile tablets?

2 Understand How Tablets Work with Your
It's important to realize that the tablet you prefer for personal use *(such as an Apple iPad)* may not be the best tablet to accomplish your business objectives.

Current DMS

Which mobile tablet platform is best for your dealership? For business purposes, there are three choices:

- Apple iOS/iPads
- Windows
- Android

Before deciding upon a brand of tablet, create a checklist using the list of applications that each department wants to use on their tablets. Ask your DMS vendor, OEM and other vendors if their applications run on the platform you're considering. Ask to see demos of how they run! Keep in mind that just because a vendor tells you their applications will run on a tablet, does not mean they will run well.

The important thing to know is if the applications are remote or native.

A native application is designed specifically to run on a mobile device.

A remote application means that the application is running on your Windows PC, and you are using the tablet as a remote device that connects to the application. One problem with remote solutions is that Windows applications have never been designed to be touch-friendly, so the tablet connections can be slow.

Another drawback to accessing applications remotely is that it requires the use of a dedicated PC, which means that even if a service writer is in the service lane with his tablet, nobody else can use his PC.

For optimal mobile tablet performance, applications should be native.

3 Choose a Mobile Tablet Platform

The next step in choosing a tablet is to take the results of your needs analysis and decide which platform will meet most, or all, of your requirements.

Pros and cons for each platform:

Apple iOS

Pros: The Apple iPad is the most popular brand of tablet. iPads are user-friendly and look great. Most vendors have solutions that work with the iPad.

Cons: iPads may run into compatibility issues with some business applications because the majority of dealerships still run on Windows PCs. iPads use the Safari web browser, which may not work well with your OEM websites. iPads can be used as additional devices, but in most dealerships, they are not viable replacements for PCs.

Android

Pros: Android OS tablets offer all the same features and benefits as the iPad at a less expensive price point.

Cons: Like the iPad, Android OS tablets may not run the majority of the applications that you're running in your dealership. Android uses Chrome as a web browser. Any web applications you use will have to work in Chrome.

Windows

Pros: A Windows tablet is the only tablet that can be used as a viable replacement for a PC. With a dock and keyboard, a service writer can use the tablet at his desk like a PC, then take it with him to the service drive and continue to use all the same apps in tablet mode.

Windows tablets may now include Windows 10, Microsoft's newest OS. Virtually every DMS solution can run on Windows 10, so everyday tasks can be performed on the tablet such as parts inquiries, sending emails and updating spreadsheets. Windows 10 also supports connectivity and security requirements.

A similar option to consider is Hybrid laptops, or 2-in-1s. These devices can be used as both a laptop and a mobile tablet, by either detaching the screen or folding it over.

Cons: Windows tablets don't carry quite the same cache as the other two tablet brands. With Windows tablets, the cheaper "RT" version is not recommended, as it can't run most Windows applications. The RT versions still use Windows 8 OS, which does not support security and connectivity requirements.

Microsoft's Surface Pro or similar Windows tablets are recommended, but these are more expensive than either the iPad or Android. When considering expense, realize that Windows tablets and Hybrid 2-in-1s can be used in lieu of a PC.

4 Upgrade Infrastructure

Nothing is more frustrating than investing in a new technology, only to have your employees summarily reject it. If the tablets are unresponsive or slow, your staff will not use them. Future attempts at re-introducing tablets will be met with resistance.

An investment in mobile tablets will likely require additional investments in your information technology (IT) infrastructure. It's highly recommended that you don't skimp in this area. There are five key components to consider:

Internet

The amount of bandwidth your dealership requires varies based on the number of users, devices and applications used, and whether you're running a Voiceover IP phone system. Work with your Internet service provider to determine what's right for you.

Be sure your dealership has a business or enterprise-class Internet connection, not a residential connection. A business connection delivers more bandwidth, better support and includes a static IP address, which is necessary for security purposes.

Wi-Fi

Consumer-grade Wi-Fi routers from big box stores are inadequate for business applications at your dealership. Your mobile tablets will be transferring massive amounts of data over your Wi-Fi network and will require numerous wireless access points to be placed strategically throughout your dealership. Scheduling a survey with a wireless vendor is highly recommended, as they have specialized equipment to determine where signals are strongest and where interference is highest.

For security purposes, you'll probably want two Wi-Fi networks: one for your business mobile applications and the other for customers. These should also be on separate networks, or VLANs, than the rest of your dealership's network, so if degradation or security breaches occur, it won't affect operations.

Firewall

A firewall prevents unauthorized access to or from your Wi-Fi networks, in addition to your business network. Install a firewall that allows IT staff to manage all wireless access points from one device, including changing settings and passwords. Firewalls also monitor and filter network traffic so access to certain websites can be prohibited.

Network Switches

Switches connect network devices together and transfer data between those devices via packets. There are two types of switches: managed and unmanaged. For businesses, managed switches are recommended. Managed switches allow you to control access, security and communications speeds for all devices. This maximizes productivity over mobile networks and adds an extra layer of security.

Cabling

Somewhere in your dealership lies the server or computer room. If your dealership is like many others, there's a pretty good chance that room is in a state of disarray. It's common as devices get added and removed, and new technologies are implemented, that the wires and cables connecting them all begin to resemble a tangled mess.

As your dealership staff become more reliant on their mobile tablets for business operations, it's critical to be able to manage the mobile network efficiently. When cables are color-coded,

clearly labeled and neatly arranged, it requires less time to identify, troubleshoot and fix problems. Encourage your IT staff or vendor to keep your server room and cabling in order.

> ### Don't make it easy for hackers to gain access to your DMS data via your Wi-Fi network!
>
> When setting up mobile tablets, choose strong passwords. Don't use the default password, sequential numbers, the dealership's name or other common passwords. Passwords should be changed every 90 days.

5 Adopt Mobile Service Tablets in the Service Department

The service department stands to benefit the most from mobile tablet adoption in terms of revenue potential and increased customer satisfaction.

With full DMS integration, mobile tablets can be used for the following processes:

- Greet the customer in the service lane
- Retrieve or create an appointment using the customer's name, phone number or other criteria.

- Instantly scan the VIN
- View entire vehicle history, warranty and/or factory recall information
- Convert appointment information into an electronic repair order (RO) with one click of a button
- Perform multi-point inspections
- Pull up an archived multi-point inspection from the customer's last visit
- View recalls and recommended services
- Send multi-point inspection form attached to an electronic RO to technicians, who can pull it up on the electronic workbench to instantly follow up on items
- Parts inquiries
- Take pictures or video of worn parts to show to the customer
- Present findings to the customer on the tablet for customer approval, or email the form to the customer for sign-off

Benefits

- Transition to a completely paperless environment, eliminating time wasted on double entry and greatly reducing inaccuracies
- More interaction with customers increases customer trust and loyalty
- Photo and video documentation paves the road to a better upsell process
- Streamline processes, increasing productivity of service

advisors and technicians

- ■ Photo documentation of the vehicle at the time of appointment protects against customer claims of dealership damage
- ■ Increases service revenue 30-50 percent within the first year

6 Consider Design Updates to the Service Lane

Creating a tablet-friendly environment is helpful if you want your employees to embrace using mobile tablets. Consider the following design updates and recommendations for your service lane:

Covered Service Drive

Using mobile tablets in the rain or snow can be tricky. Tablets are designed for indoor use and don't incorporate Gorilla glass or other rugged features like the Toughbooks used by cable and UPS workers. Installing a cover in the service lane to prevent tablets from getting wet prevents damage and as a bonus, increases customer satisfaction.

Standing Platform

Install a flat surface at standing height so if someone needs to enter a lot of data, they can set the tablet on the stand and plug in a keyboard. Typing with a keyboard speeds up the process versus using the touchscreen.

Carrying Cases

How often do your service writers pop open a hood to take a look at the engine? Having a hip or shoulder carrying case to secure mobile tablets is a must. You don't want service staff to set tablets down on a customer's vehicle (nor do your customers), and having a holder prevents tablets from being dropped or stepped on. Carrying cases also reduce the likelihood of tablets being left unattended, greatly reducing the chances of theft.

Touchscreen Gloves

Mobile tablet touchscreens have difficulty sensing cold or wet fingers. In the winter, provide staff with touchscreen gloves made with conductive fabrics to alleviate this problem.

7 Adopt Mobile Tablets in the F&I Department

During the turn over from sales to F&I, customers often have to wait until the F&I manager is available. Handing customers a mobile tablet with a display of the F&I menu during this wait time will increase their engagement and help to shorten the sales process.

While they are waiting, the customer can answer a questionnaire about how they plan to use their vehicle. The answers they provide results in a custom menu presentation of F&I products such as warranties, service contracts, tire and wheel protection

plans, insurance, roadside assistance and more. If the customer is not familiar with the benefits of a product, they can click on a link to find more information or watch a video demonstration.

A mobile tablet presentation of product benefits is perceived by customers as imposing less pressure upon them to make a purchase decision, rather than sitting in front of the F&I manager. This makes the customer feel more empowered, which in turn builds trust and ultimately increases product sales.

With full DMS integration, mobile tablets can be used for the following F&I processes:

- Educate customers on the products that interest them
- Allow customers to drag and drop their own product selections into customized packages
- Menu presentations
- Present pricing and payment options
- Digitally sign and deliver documents

Benefits

- Reduced customer wait times
- Educational videos help increase customer engagement
- Customized menu presentations take the pressure off customers and increase trust
- Increased sales and retention opportunities
- Auto population of F&I data into the dealership management system (DMS) reduces double entry and errors

- Elimination of paperwork
- Up to 20-percent increase in gross profit per deal

8 Adopting Mobile Tablets in the Sales Department

Mobile tablets shine as a tool that can present visual information such as inventory videos, dealership videos, online reviews and other information that may be used in the decision making process. Rather than attempt a hard sell, engage your ups by asking them about their needs and then pulling up information on why that vehicle and your dealership are the best solution for their needs.

Mobile tablets can also be used to combat showrooming. This is when savvy customers come in to your showroom with smartphones and start checking out your competitors' pricing. If you really want to be transparent, have your salespeople beat these price shoppers at their own game. If a customer starts showrooming, a salesperson could whip out their tablet and search along with the customer, all while guaranteeing the lowest price.

With full DMS integration, mobile tablets can be used for the following sales processes:

- Search for dealership inventory
- Search for competitors' inventory pricing

- Scan VINs
- Demonstrate features for customers/virtual test drives
- View and offer online specials and incentives
- Share dealership videos and online reviews
- Scan the customer's driver's license and update information immediately within the CRM and/or DMS
- Perform video walk-arounds for customers off the lot

Benefits

- Engages customers in the buying process
- Increases transparency to build customer trust
- Educates customers to build confidence
- Reduces time customers spend in the sales process

9 Train & Educate Employees

Integrating mobile tablets into dealership processes requires a significant investment. In order for implementation to be successful, it's critical that your staff embrace the use of mobile tablets.

Training and education are key. Schedule tutorials and require that all staff run through each process several times before they actually use the mobile tablets with a customer.

Management buy-in is also important. It takes money, time and resources to set up an environment that makes it easy and enjoyable for the staff to use their mobile tablets.

Some employees may be reluctant to complain or mention problems they are having. Encourage managers in each department to be proactive and reach out to employees for feedback.

Best Practices When Using Mobile Tablets

Mobile tablets engage customers and speed up processes when used correctly. Best practices include:

1. Don't rush. While expediting processes is a major benefit, you don't want staff to rush through every process. For instance, service advisors should take their time when they greet customers and talk to them about their vehicle,

instead of quickly opening an RO and getting down to business. Although some customers appreciate being taken care of quickly, others may feel slighted if they perceive they are being "rushed." Take cues from the customers.

2. Focus on the customer. Mobile tablets can engage customers as long as the employee's attention remains focused on the customer, not on the tablet. Watch out for employees who stare at the tablet while a customer is in front of them. It's important to maintain eye contact, smile and make conversation with the customer. When the tablet gets all the attention and the customer gets none, your staff may be alienating customers instead of engaging them.

10 Maintain Your Mobile Tablets

To protect your mobile tablet investment and extend battery life, be sure the tablets are maintained properly. Tips include:

Keep the OS updated. Whether you're using an iPad, Windows or Android platform, it's important to download updates as soon as they're available. Manufacturers routinely release OS updates that contain new features, security enhancements and bug fixes that keep the system running smoothly.

Avoid extreme ambient temperatures. Mobile tablets should not be left in the extreme cold or extreme heat. Freezing temperatures cause internal and external components to become rigid, causing damage; while heat causes components to overheat, batteries to leak and possibly even explode.

Buy protective cases. Service techs may need to use tablets in the rain or snow. Cases that include a cover to protect the screen from moisture are a must.

Uninstall or disable unused applications. Many mobile tablets come pre-loaded with apps that you won't need in a work environment. News, sports, weather or game apps may be nice to have, but they compete for the mobile tablet's resources, slow down performance and drain battery life.

Clean tablets regularly. Use microfiber cloths to clean your tablets. Do not use paper towels or part of your shirt to clean surfaces, as these materials may scratch the glass. If the tablets get grimy, do not use alcohol-based cleaners. Turn the tablet off, remove the battery and dip one corner of the microfiber cloth in a little bit of water. Wipe, then dry with the other part of the cloth.

Install security software. If you decide to use Windows tablets, remember that they are essentially PCs, and thus require security software that will protect against viruses, malware and intrusions.

Consult documentation. Every tablet comes with specific maintenance tips and guidelines. Read the documents and assign a team member in each department to keep tablets maintained.

Conclusion

Incorporating mobile tablets into your dealership processes allows you to present visual information and engage with the customer. Visual information increases transparency and empowers customers to make their own decisions.

It's one thing for your service advisor to recommend a service. It's quite another to present the customer with a picture of a part that needs to be replaced and a video that explains why that part is important and gives safety precautions. Seeing really is believing.

Out of all the benefits that mobile tablets offer, the most significant is the increase in transparency. Transparency leads to greater customer trust and loyalty, which ultimately has the greatest positive impact on your dealership's bottom line.

A DMS that does business differently.

Auto/Mate by DealerSocket is a leading dealership management system provider. Our innovative software delivers the functionality, flexibility and value dealers need to maximize profits, optimize processes and enhance the customer experience while saving thousands on their monthly DMS bill.

The addition of Auto/Mate to DealerSocket's suite of products creates a new choice for dealers seeking a connected platform that's driven by innovation and backed by award-winning customer service. Together, we serve more than 9,000 dealerships and 300,000 users. For more information, visit www.automate.com or follow us on Facebook, Twitter or LinkedIn.

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