

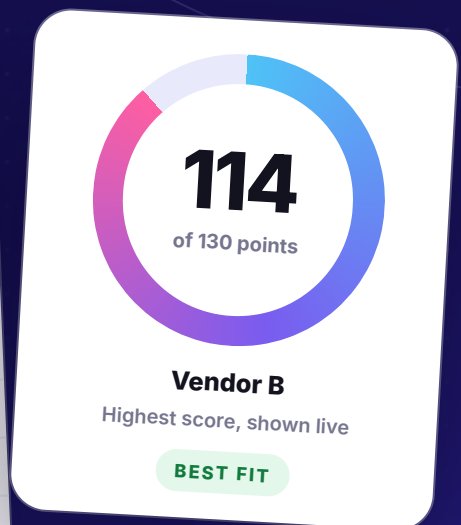
FREE BUYER'S CHECKLIST · 2027 EDITION

The Complete Dealership CRM Checklist

Score every CRM on the same lines, in the demo, before you sign.

☒ Vendor scorecard EXAMPLE

SECTION	MAX	A	B	C
Internet leads & customer info	/26	20	24	16
Lead reading & intelligence	/20	14	18	12
Customer communication	/12	10	10	8
Email & texting	/14	12	12	8
Integration & API access	/26	16	22	18
Manager dashboard	/20	14	18	12
Reporting	/12	8	10	6
Total, sections 1-7	/130	94	114	80



8

sections, from leads to pricing

130

points, each line scored 0-2

3

vendors, side by side

1

first-year price sheet

HOW TO USE THIS CHECKLIST

Test every CRM against your own workflows

A prepared demo shows what a CRM can do under ideal conditions. The useful evaluation is the one where the dealership brings its own scenarios and asks every vendor the same questions, in the same order, with the same lead.

1

Bring real examples

One actual internet lead, three reports you already run, and the list of systems the store uses today.

2

Score every line 0–2

For up to three vendors, in the same session. Score what you saw, not what the rep described.

3

Total, then price

Add up sections 1–7 on the summary page, then compare first-year cost on the pricing sheet.

- 2 Shown live** in the demo, on your data, without a workaround.
- 1 Partial.** Exists but needs an add-on, a workaround, or a future release.
- 0 Not available**, or not demonstrated when asked.

Contents

01 Internet leads & customer information	26 pts	06 Manager dashboard visibility	20 pts
02 Lead reading & customer intelligence	20 pts	07 Reporting	12 pts
03 Customer communication	12 pts	08 Pricing worksheet	\$
04 Email & texting	14 pts	09 Real dealership scenarios	worksheet
05 Integration & API access	26 pts	10 Scoring summary	130 pts

Vendors under evaluation

	VENDOR A	VENDOR B	VENDOR C
CRM / edition			
Demo date			
Vendor contact			
Test lead used			

1 Internet Leads and Customer Information

The CRM should receive and display every lead exactly as it arrived, keep the customer's own words visible, merge duplicates without losing history, and route each opportunity by the dealership's real assignment rules.

A CRM SHOULD BE ABLE TO	A	B	C
Receive leads from all dealership lead sources.	☐	☐	☐
Identify the source and type of lead.	☐	☐	☐
Display the complete original lead information.	☐	☐	☐
Preserve the customer's original comments and questions.	☐	☐	☐
Display vehicle information exactly as submitted.	☐	☐	☐
Identify new, used, and CPO vehicles.	☐	☐	☐
Display stock number and VIN when supplied.	☐	☐	☐
Display trade information when supplied.	☐	☐	☐
Preserve original lead headers and data.	☐	☐	☐
Identify duplicate leads.	☐	☐	☐
Combine duplicate customer records appropriately.	☐	☐	☐
Route leads according to dealership-defined assignment rules.	☐	☐	☐
Send leads to the correct employee or department.	☐	☐	☐

13 lines × 2 = **26 points** ☐ write 0, 1 or 2 in each box



DEMO TEST

Give the vendor an actual lead and ask them to show exactly what the employee sees when it enters the CRM.

NOTES

2 Lead Reading and Customer Intelligence

Leads carry intent, objections, timing and trade details. Whether it is built into the CRM or provided by a connected conversational AI platform, the system should read that information and put it in front of the employee before they reply.

THE CRM OR CONNECTED PLATFORM SHOULD BE ABLE TO	A	B	C
Read and interpret the information contained in the lead.	☐	☐	☐
Summarize the customer's request.	☐	☐	☐
Identify unanswered questions.	☐	☐	☐
Identify customer intent.	☐	☐	☐
Recognize objections and concerns.	☐	☐	☐
Recognize specific requests.	☐	☐	☐
Review previous customer communications.	☐	☐	☐
Provide relevant context before communication.	☐	☐	☐
Recommend an appropriate call to action.	☐	☐	☐
Support dealership-defined scripts, objection handling, and communication standards.	☐	☐	☐

10 lines × 2 = **20 points**



DEMO TEST

Submit a test lead with several details and ask the vendor to show exactly what the system understands about that customer.



ASK AS WELL

If the store follows a specific communication curriculum, script library or objection-handling framework, ask how the system is configured to follow it, and who maintains that configuration.

NOTES

3

Customer Communication

One complete, dated history of the relationship, with every change attributed to a person or to automation, readable from the customer profile on desktop and mobile.

THE CUSTOMER RECORD SHOULD

	A	B	C
Date and timestamp every communication, activity, record change and follow-up adjustment.	☐	☐	☐
Show whether an action was completed by an employee or by automation.	☐	☐	☐
Keep an audit trail of changes or deletions to customer, vehicle and trade information.	☐	☐	☐
Let managers see how a record changed over time, not only its current version.	☐	☐	☐
Show inbound and outbound communication from one area of the profile.	☐	☐	☐
Keep notes, activity, texts and emails accessible in the desktop CRM and the mobile app.	☐	☐	☐

6 lines × 2 = **12 points**



MANAGER TEST

Ask the vendor to open a customer record with several weeks of activity and multiple employee interactions. A manager should be able to understand the history quickly from the customer profile.

4

Email and Texting

Core channels belong inside the record: delivery and read information where supported, the full conversation in order, and both channels available from the mobile app.

CONFIRM THAT THE CRM CAN

	A	B	C
Track delivery status where supported.	☐	☐	☐
Display available open or read information.	☐	☐	☐
Preserve complete text conversations.	☐	☐	☐
Preserve complete email conversations.	☐	☐	☐
Maintain the historical communication record.	☐	☐	☐
Support texting through the mobile app.	☐	☐	☐
Support email through the mobile app.	☐	☐	☐

7 lines × 2 = **14 points**

5 Integration and API Access

Whether an integration exists matters less than how deep it goes. A connection that only drops a lead into the CRM is very different from one that keeps appointments, conversation history, customer status and user assignment in step.

DOCUMENTED INTEGRATION SUPPORT FOR	A	B	C
Website	☐	☐	☐
DMS	☐	☐	☐
Inventory	☐	☐	☐
Third-party lead providers	☐	☐	☐
Phone system	☐	☐	☐
Texting	☐	☐	☐
Digital retailing	☐	☐	☐
Desking	☐	☐	☐
Finance	☐	☐	☐
Trade tools	☐	☐	☐
Chat programs	☐	☐	☐
Data mining programs	☐	☐	☐
AI programs	☐	☐	☐

13 lines × 2 = **26 points** 2 = documented, two-way where it matters, no extra fee · 1 = one-way, delayed or paid · 0 = none



INTEGRATION QUESTION

For each product your dealership currently uses, ask what data syncs, how often it syncs, and whether there are any additional fees or limitations.

PRODUCT WE USE TODAY	WHAT SYNCs	DIRECTION	FREQUENCY	EXTRA FEE?

6 Manager Dashboard Visibility

The dashboard's value is how clearly it shows where follow-up has stalled, which customers are waiting and where employee activity needs attention, without searching. Dealer groups also need the view across rooftops, with a drill-down to one store or one employee.

THE DASHBOARD SHOULD PROVIDE VISIBILITY INTO	A	B	C
New leads	☐	☐	☐
Leads without responses	☐	☐	☐
Customer responses awaiting action	☐	☐	☐
Today's appointments	☐	☐	☐
Future appointments	☐	☐	☐
Missed appointments	☐	☐	☐
Sold customers	☐	☐	☐
Unsold customers	☐	☐	☐
Employee activity	☐	☐	☐
Response times	☐	☐	☐

10 lines × 2 = **20 points**



DEMO TEST

Ask the vendor to show how a sales manager would use the dashboard at the start of the day to identify the most important follow-up activity.

NOTES

7 Reporting

Reports the store can build itself, percentages rather than raw totals, and lead ROI that connects a source to appointments, sales and gross, not just volume.

THE CRM SHOULD SUPPORT	A	B	C
Reports built in-house.	☐	☐	☐
Performance reports with percentages.	☐	☐	☐
Lead ROI and dealership marketing reports.	☐	☐	☐
Leads without recent engagement.	☐	☐	☐
Lost lead reporting.	☐	☐	☐
Gross profit reporting where applicable.	☐	☐	☐

6 lines × 2 = **12 points**



REPORTING TEST

Bring several reports your dealership already uses and ask the vendor to recreate them during the evaluation.

Reports we run today, rebuilt live in the demo

REPORT	FILTERS AND MEASURES IT NEEDS	A	B	C
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐

NOTES

8 Pricing Worksheet

Compare the complete cost, not the base subscription. Vendors package features differently, so get every required line priced for the exact configuration you were shown, then total the first year.

REQUIRE VENDORS TO PROVIDE	VENDOR A	VENDOR B	VENDOR C
Base CRM price with ILM and desking.	_____	_____	_____
Per-rooftop cost.	_____	_____	_____
Multi-location discount, if available.	_____	_____	_____
User fees or user limits.	_____	_____	_____
AI cost.	_____	_____	_____
Texting cost.	_____	_____	_____
Driver's license scanner cost.	_____	_____	_____
Integration costs.	_____	_____	_____
Implementation cost.	_____	_____	_____
Data migration cost.	_____	_____	_____
Training cost.	_____	_____	_____
Complete first-year cost of the configuration demonstrated	_____	_____	_____

Flag any line that changes with usage, modules, leads, conversations or rooftops.



PRICING TEST

Ask for the complete first-year cost of the exact configuration being demonstrated.

Data migration: get it in writing

- ☐ What information will transfer
- ☐ How much history is included
- ☐ How duplicate records are handled
- ☐ What data may not migrate

Training: what the price includes

- ☐ Initial training for every role (sales, BDC, managers)
- ☐ Training for new hires after launch
- ☐ Manager reporting and dashboard training
- ☐ Who owns configuration changes after go-live

9 Real Dealership Scenarios

Use the same real-world examples with every vendor. The same lead, the same reporting questions, the same integrations, the same customer workflows, so the comparison is about how each platform would function inside the dealership rather than how it looks in a prepared demo.

SCENARIO	WHAT YOU BRING	A	B	C
Customer information	One real lead with a trade, a question and a vehicle of interest	☐	☐	☐
Customer intelligence	The same lead; what does the system understand before anyone replies?	☐	☐	☐
Communication history	A record with weeks of activity across several employees	☐	☐	☐
Manager start of day	Where is follow-up stalled, and who is waiting on us?	☐	☐	☐
Reporting	Three reports the store already runs, rebuilt live	☐	☐	☐
Technology stack	The list of systems the store uses today, and the ones planned	☐	☐	☐

Scored 0–2 like the sections above; these are a cross-check, not part of the 130-point total.



ROOM TO GROW

The store does not need to know every tool it will use in three years, but it should know whether the CRM leaves room to adopt them: open integrations, usable APIs, flexible reporting and strong data visibility.

10 Scoring Summary

SECTION	MAX	A	B	C
01 · Internet leads and customer information	26			
02 · Lead reading and customer intelligence	20			
03 · Customer communication	12			
04 · Email and texting	14			
05 · Integration and API access	26			
06 · Manager dashboard visibility	20			
07 · Reporting	12			
Total	130			
Complete first-year cost (from the pricing worksheet)	\$			

WHICHEVER CRM YOU CHOOSE

The right CRM should make customer information more useful

Dealerships already collect large amounts of customer information. The value of the CRM comes from how well it organizes and uses it: a clear view of the customer for employees, a clear view of what needs attention for managers, relevant reporting, and connections to the rest of the technology stack.

MATADOR AI WORKS ALONGSIDE THE CRM

Conversations with context, inside the systems you already run

Matador is not a CRM. It is the conversational AI layer that reads the lead, answers in about 30 seconds, follows up for months and books the appointment, then writes the conversation back to the CRM your team already uses.

- ✓ Certified partner of eLead, VinSolutions, DealerSocket and Xtime; two-way sync with Activix, DealerCX, DealerPeak and TMS
- ✓ Reads repair orders and service appointments from Tekion, Reynolds, CDK, Dealertrack, PBS and Titan
- ✓ A browser extension that opens the conversation from any CRM record, with the full history loaded

Book a demo at matador.ai/book-a-demo

The automotive CRM knowledge center

Definitions, the evaluation framework, every CRM Matador connects to, and what syncs in which direction.

matador.ai/automotive-crm

The full checklist, with the reasoning

The companion article walks through each section and why it matters.

matador.ai/blog/dealership-crm-checklist-how-to-choose-an-automotive-crm

Every integration, one page each

What each connection covers, in which direction, and how long it takes to connect.

matador.ai/integrations

The browser extension

Text customers from inside VinSolutions, eLead, DealerSocket, Tekion or any tool that lives in a tab.

matador.ai/extension