



How To Change Dealership Management Systems (DMS): 50+ Point Inspection Form To Switch Your DMS Efficiently

1 Clear DMS Obligations

- If you know the DMS end date, send a termination letter effective at expiration date, or send a non-auto renewal letter if applicable.
- Send a contractual obligations letter if the end date is unclear. Once you know, send a termination or non-auto renewal letter.
- Send letters via certified mail. Scan signed letters before mailing. Email the scans to the DMS billing department for expediting.
- Terminate DMS-related services that were contracted separately (e.g. CRM, phones, F&I tablet solutions, marketing services).
- Pre-pay for the incumbent DMS agreement until contract end.
- Cancel existing agreements with Finance/Leasing companies or their affiliates to avoid any lease auto-renewals or buyouts.
- Replace DMS-resold services of 3rd Parties (e.g. credit checks).
- Inform your 3rd Parties of the DMS switch & cutover date. Ask about the data integration certification & expected fees.
- Eliminate 3rd parties if services are replaced by the new DMS.

2 Lead People & DMS Change

- Lead & bring dealership partners, executives & teams together. Allow staff to voice fears & observations. Focus on the WHY.
- Pay attention to opinion-makers & resistance. Convince them of a DMS change on the individual-, team-, & company-level.
- Watch relationships between dealer personnel & DMS staff. Shut down anyone creating doubt & fear.
- Review all dealership processes & team roles to optimize workflows. See this as an opportunity to redesign your SOPs.
- Include all locations & team members. Don't forget off campus stores, body shops, used car lots & parts warehouses.
- Make training mandatory without any cuts. Ask team members for their training preferences (online tutorials, in-class, sandbox).
- Identify Key Performance Indicators to monitor progress on efficiency improvements & Return-on-Investment.

3 Manage & Map DMS Project

- Expect the installation team of your new DMS provider to reach out for project plan, tasks & responsibilities & workbook.
- Clarify the installation lead time with the new DMS vendor. Plan for some DMS overlap, but don't use both at the same time.
- Request experienced onsite resources. Ask for detailed install & training schedules with names, days, hours & DMS certifications.
- Request installers from layered application partners onsite at the time of the DMS installation so they can work through issues.
- Install a project lead (ideally with PM or military experience) & name department champions to monitor department progress.
- Have weekly meetings to inform your team. Check on the progress-made & monitor your team members' activities.
- Run a training/install log book. When do trainers come onsite? How much time is spent on training? How much on DMS setup?
- What tickets are still open? Prioritize the issues. Don't let your DMS vendor make changes or close tickets without your sign-off.
- Keep your old DMS sales rep close to you - & nobody else. Don't let him/her start a brawl in your dealership.
- Use project management software if available (e.g. Asana).
- For dealer groups: evaluate a phased vs. a big bang rollout. Stages are better for capturing learnings & best practices.

4 Support DMS Conversion & Setup

- Support your new DMS provider in accessing & mapping your dealership data. Did you get a DMS termination confirmation?
- Identify data fields that MUST & CANNOT be converted. Review them with your new DMS vendor for transparency & options.
- Pre-check your DMS data quality. Avoid garbage-in/out. Do you need DMS data purging, cleansing/scrubbing, or enrichment?
- Do you need an additional Dealer Service Provider for your DMS archive conversion? What format do you need for your files?
- Request the workbook from your new vendor. Ask for support to fill it out TOGETHER. Convert your current config if applicable.
- Make sure you talk the same language. How do you look up customer numbers if the new DMS runs on stock numbers?
- Set up the DMS workflow & automations based on your process & team reviews. Consider the best-practices of your new vendor.
- Have your new DMS vendor set up your department reports.
- Provide all forms for programming incl. pre-printed paper forms.
- Switch your dealership CRM system (if desired) before you change DMS to move more data & ease the DMS transition.
- If you need a 3rd party document scanning company with your new DMS, start scanning docs early - even if still on the old DMS.
- Review (again) any possible gaps in your DMS coverage.

5 (Re-)Build DMS Infrastructure

- Send back any leased/rented DMS equipment (e.g. laser printers, network gear). Have your DMS rep help you clarify ownership.
- Check the compatibility of the remaining gear with the new DMS. Read the specs to ensure repurposing of gear (e.g. TWAIN scan).
- Sell existing gear if you cannot repurpose it. For example see if you can resell printers through www.mydealerdirect.com.
- Replace existing gear if no alternative is available (e.g. reduce laser printers by switching to digital esign in F&I or Service).
- Buy new equipment for new applications like tablet PCs & wireless network equipment for a Service Lane write-up tool.
- Install the equipment before the DMS switch. Test the gear prior to the DMS GoLive. Have IT support avail. during the DMS install.
- Review your internet speed & SD-WAN availability in your area. Esign & digital image solutions need a lot of bandwidth.
- Check if you need to replace VoIP phones or other connected solutions. Update your network & seek managed IT support.
- Assess your dealership IT security needs. Run a penetration test.
- Evaluate remote workforce & mobility needs for your dealership.

6 Embrace DMS Success Management

- Get the contact information of your DMS success or performance manager & for your technical support team.
- Establish your preferred cycle for DMS utilization & performance reviews. Name your main dealership contacts.
- Define your escalation path in case of mission-critical events (e.g. DMS downtime or DMS data breach).
- Ensure you will receive onsite support from your new DMS vendor for your first payroll & month-end processing.
- Request onsite follow-up training in 3-6 month to refresh your DMS utilization & enforce your optimized processes.
- Identify any skill gaps of your team members. Pair slow movers with talents. Mentor your staff & provide support.
- Have your new DMS provider write training schedules. Monitor training progress. Write a training manual for new hires.
- Review pay plans when you adjust your dealership processes & workflow. Incentivize the right behavior & activities.
- Follow up with all 3rd parties. Check on the DMS integrations. Did any metrics change dramatically suggesting a loose end?

