

ONBOARDING PROGRESS TRACKER



Welcome to DealerSocket

Hi there.

How's it going? Yeah? That's good. Us? Oh, we're fine — thanks for asking. We're actually doing a lot better now that you're here. We don't mean to weird you out... we just like getting paid for helping get you even more money. Yay us!

So look, we're going to be sending you a bunch of emails in the coming weeks. We promise these won't be marketing emails; they're just to get you up and running. It's going to take a little effort from both of us to get the money-making train chugging. But once you're all set up, we promise to leave you alone. That is unless you like hearing from us 😊

Sorry, that got weird again, didn't it?

There are about 1,800 of us on Team DealerSocket supporting YOU. Most of us are high-fiving over having you (the rest are asleep; I mean seriously, we've got people in a lot of different time zones).



WHAT'S NEXT?

Soon you'll be hearing from your project manager, <PM first and last name>, your main point of contact for the first phase of your installation. If you have any questions, just let us know. <PM first name> has your back. You can reach <PM first name> at <PM phone number> or <PM email address>.

OK, I think that does it for now. Talk again soon.



Team DealerSocket

SUPERCHARGE YOUR ONBOARDING



VIDEO
We Are Automotive

KEEPIN' IT ¹⁰⁰: The DS Newsletter

Get the straight dope on the dealer industry.



ONBOARDING PROGRESS TRACKER



Hello .. you. ("Friend" seems presumptuous at this point. Are we really friends yet? Maybe we can upgrade by the end of this email.)

We heard you did a kickoff call. Great! The big thing you should take away from it is that **we need your help badly to get you up and running.** (Grrr! — bold means we really mean it.) We need:

- Your user information with DMS IDs
- DMS authorization/setup
- Your dealership logo

THE FIRST 48

Look, stores that get us this info within 48 hours usually launch on time. And time is money — so let's get that money .. time .. stuff. Please send it all to us in the next day or two so we can keep things moving on your install, friend. (Mm, that feels good.)

Love,
Team DealerSocket

WHAT'S NEXT?

Coming up next ...
Your strategy call.

I NEED DETAILS

HOW IS YOUR ONBOARDING GOING?



YAY



MEH



UGH

POINT OF CONTACT



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SUPERCHARGE YOUR ONBOARDING



LANDING PAGE
We Are Automotive

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ONBOARDING PROGRESS TRACKER



Hi. Us again. You made it through your strategy call. It may have been a barnburner, but our elves are now working on all your DealerSocket processes and preferences (and you wouldn't believe the labor laws for elves!).

KEEP ON KEEPIN' ON

There's going to come a point where you don't hear from us nearly so often. We promise. Let's keep pushing ahead and that glorious day will come before you know it.

For now, if you haven't submitted all your process requests for follow-up campaigns and submitted all personalized email templates and documents, now's the time. And if there's anything still outstanding from your kickoff call, we need those asap. Send them to <PM First Name with email address embedded> stat!

Love, Team DealerSocket

WHAT'S NEXT?

Coming up next... Your data QA call.

I NEED DETAILS

EXTRA CREDIT

You're killin' it so far, so here's some extra credit: why not get a jump on training? Our virtual classroom is the first place you should go. We suggest something from the basic salesperson, mobile, sales management, and/or marketing/admin classes to begin.

TAKE ME TO CLASS

HOW IS YOUR ONBOARDING GOING?



YAY



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UGH

POINT OF CONTACT



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SUPERCHARGE YOUR ONBOARDING



DOWNLOAD Dealership Action Report

KEEPIN' IT 100: The DS Newsletter

Get the straight dope on the dealer industry.



ONBOARDING PROGRESS TRACKER

PREPARE FOR LUDICROUS SPEED

You're almost there. All the bleeps, blops, and bloops will begin soon! "But I don't know what I'm doing!" Don't worry. Breathe. We won't leave you hanging; you have a consultation scheduled. We got this.

PREPARATION LEADS TO PERSPIRATION ... OR SOMETHING LIKE THAT

What we mean to say is, bone up now. You, your most trusted tech guys, that dillard Brent — all of you (*naw ... Brent's cool*).

The most successful dealerships have at least 75% of their users complete training. If you haven't started already, dive into DealerSocket's virtual classroom. Do it now! You can access it anytime. And you're going to have questions. Ask your implementation consultant (IC). Your IC has all the answers.

And then you'll know, and knowing is half the battle.

Love,
Team DealerSocket

WHAT'S NEXT?

Coming up next...
Activation!

[REVIEW THE ONBOARDING PROCESS](#)

HOW IS YOUR ONBOARDING GOING?



YAY



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SUPERCHARGE YOUR ONBOARDING



BLOG POST
**Customized Training:
Hands on Lab**
Reuben Muinos

#SQUADGOALS: The DS Newsletter

You've got industry experts on your team now.



ONBOARDING PROGRESS TRACKER



Look at me. You're the captain now.

Congrats! We've assigned you an implementation consultant (IC), a post consultation specialist (PCS), and a customer success manager (CSM) to help keep the sailing smooth throughout your voyage with DealerSocket. First up, your IC will guide you these next few days through your consultation. Over the following two to six weeks after consultation, your PCS will help you with all your new toys. Finally, once you're comfortably up to speed, your CSM takes over as your single point of contact for infinity and beyond.

So remember:

- Your IC is <IC Full Name, embed email address>.
- Then comes your PCS: <PCS Full Name>.
- Last is your CSM life-partner: <CSM Full Name>.

In the meantime, start exploring your new installation. There is no time like the present to get started.

Aye aye, Captain!

Love,
Team DealerSocket

Achievement: Captain Badge Unlocked



WHAT'S NEXT?

Coming up next...
The IC handoff.

REVIEW THE ONBOARDING PROCESS

HOW IS YOUR ONBOARDING GOING?



POINT OF CONTACT



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SUPERCHARGE YOUR ONBOARDING



BLOG POST
Customer Service
Casey Gallenberger

#SQUADGOALS:
The DS Newsletter

You've got industry experts on your team now.



ONBOARDING PROGRESS TRACKER



Ok, you've had the wheel for a few days now. Feels good, doesn't it? Well, it's about to get even better. Your team's boots will be hitting the ground soon, which means you're about to get started with <IC First Name, embed email address>, your implementation consultant (IC).

First thing's first: schedule your team to be present during implementation week. This is a crucial time to get them excited for the adventure ahead. And if you aren't stoked, your people won't be stoked.

So GIDDY UP!

Love,
Team DealerSocket

Achievement:
Giddy Up Badge Unlocked



WHAT'S NEXT?

Coming up next ...
The post-consultation specialist handoff.

[REVIEW THE ONBOARDING PROCESS](#)

HOW IS YOUR ONBOARDING GOING?



YAY



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SUPERCHARGE YOUR ONBOARDING



WEBINAR
Your Dealership, Loud and Clear: Digital Marketing • CRM
Nathan Usher

#SQUADGOALS:
The DS Newsletter

You've got industry experts on your team now.



ONBOARDING PROGRESS TRACKER



How you doing, champ? You have gone toe-to-toe with the implementation process and are still standing. We're proud of you. Now comes the next challenger: **post-consultation.**

Your cornerman on this leg of the journey is <PCS Full Name, embed email> <PCS First Name> will help fine-tune your technology and processes. Together, you will establish best practices that will make your dealership **stable and successful** for the long haul. Pretty cool, amirite?

So stay engaged, stay proactive, keep it clean, and come out boxing!

Love,
Team DealerSocket

Achievement:
Contender Badge Unlocked



WHAT'S NEXT?

Coming soon...
The CSM handoff.

[REVIEW THE ONBOARDING PROCESS](#)

HOW IS YOUR ONBOARDING GOING?



YAY



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LANDING PAGE
[DealerSocket Support](#)

CASH US INSIDE:
The DS Newsletter

DealerSocket's industry insider, howbow dah?



ONBOARDING PROGRESS TRACKER



EYES ON THE PRIZE

Hey, pal! Hope all is going well with your post-consultation specialist (PCS). By now, you guys should be knee-deep in figuring out how to make your DealerSocket installation sing.

So, eyes on the prize: these next few weeks are *muy importante* in getting your peso's-worth out of El DealerSocket.

Remember: ask your PCS <PCS First Name> any and all questions that pop into your head. If you're unclear on anything, now is the perfect time to get crystal.

Ok? Ok. Talk again soon.

Love,
Team DealerSocket

WHAT'S NEXT?

Still to come ...
The CSM handoff.

[REVIEW THE ONBOARDING PROCESS](#)

HOW IS YOUR ONBOARDING GOING?



YAY



MEH



UGH

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DOWNLOAD
Communication is Key
Dealership Action Report

CASH US INSIDE: The DS Newsletter

DealerSocket's industry insider, howbow dah?



ONBOARDING PROGRESS TRACKER



Ok, it's 3rd and goal. You're in the red zone. It's time to quit effin around. Let's take this baby to the house.

This magical opportunity to button up your processes and workflows will be closing soon. We hope you're taking advantage just like mom hopes you're eating your veggies (you need your nutrients!).

LAST CALL

Your lifeline during this post-consultation phase is <PCS Full Name, embed email address>. Shoot <PCS First Name> an email, place a phone call, send smoke signals — the point is, don't miss this chance to squeeze every bit of value out of us. Exploit us! We don't mind!

OK, ready? ... Break!

Love,
Team DealerSocket

WHAT'S NEXT?

Coming up next ...
The CSM handoff.

REVIEW THE ONBOARDING PROCESS

HOW IS YOUR ONBOARDING GOING?



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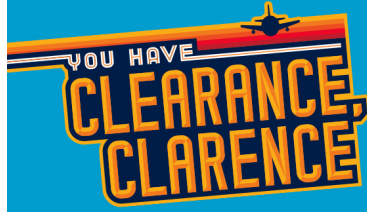
WEBINAR
Focus on Fixed Ops & Parts
Cavan Robinson

CASH US INSIDE:
The DS Newsletter

DealerSocket's industry insider, howbow dah?



ONBOARDING PROGRESS TRACKER



You made it! You've graduated summa cum laude (that's what she said!). Farewell, project manager. Adieu, implementation specialist. Auf Wiedersehen, post-consultation specialist. Now it's konichiwa to your co-pilot from here on out: your customer success manager (CSM) <CSM Full Name with email embedded>.

Your CSM will keep a watchful eye over your DS usage. Based on exclusive data, <CSM First Name> will conduct business reviews and proactively offer advice to keep you and your DS installation a lean, mean money-making machine.

So, the big takeaway: If you need anything, <CSM First Name, embed email address> (<CSM phone number>) and DealerSocket Support <embed email address> (<DS Support phone number>) are a phone call or email away.

Good luck. We're all counting on you.

Love,
Team DealerSocket

Achievement: Takeoff Badge Unlocked



REVIEW THE ONBOARDING PROCESS

HOW IS YOUR ONBOARDING GOING?



YAY



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SUPERCHARGE YOUR ONBOARDING



WEBINAR
Survival of the Fittest
Aaron Schinke

MAJOR KEY ALERT:
The DS Newsletter

Get DealerSocket's key to dealer success.



ONBOARDING PROGRESS TRACKER



HOWZIT?

Hi, <Customer First Name>. You're looking well. Are you doing something different with your hair?

Look, we'll level with you. We did not email just to talk about your hair. It's full of body yet manageable, and we are very jealous! However, more pressingly — these early days, weeks, and months on DealerSocket are crucial. The habits you form now will stick for a lifetime. We need to do this thing right, or it may not work as well as it should.

A-1 on the list is keeping a tidy CRM. A well-maintained CRM keeps your data good, your pipelines clean, and your reporting accurate. And all of THAT helps you stuff large bills down your accountant's slacks. (Please don't do that for real. We're pretty sure that's harassment.)

To keep a clean CRM, your CSM <CSM First Name> has some vital information to share with you. Call or email <CSM First Name, embed email> and ask for a health check of your CRM and specific tips on how to keep it spic and span.

AND WHILE YOU'RE AT IT ...

Please give us your hair styling tips. We need help — we're stuck in a dark room engineering your software all day long for Pete's sake!

Love,
Team DealerSocket

[REVIEW THE ONBOARDING PROCESS](#)

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SUPERCHARGE YOUR ONBOARDING



BLOG POST
Digital Marketing is a New Tradition
Mark Lozano

MAJOR KEY ALERT: The DS Newsletter

Get DealerSocket's key to dealer success.



ONBOARDING PROGRESS TRACKER

IT'S OFFICIAL YOU'RE A BLACK BELT

Can you believe it? Over the past few months, you've gone and become a **tech-savvy dealership!** Say **whaaat?** Your systems are up and running. Data is whizzing along. It's time to take the baby gloves off — time to earn your black belt in DealerSocket.

At its core, DealerSocket CRM is a powerful marketing engine. When running at full efficiency, you should be digging into its multi-sequence campaigns, automated click funnels, and targeted list-builder blasts. You from a several weeks ago might have been shaken by such big concepts. *Black-belt-you wipes the blood from your wounds and dots it on your tongue. #badass!*

YOUR FINAL ASSIGNMENT

You're ready. Summon your CSM sensei to teach you the not-so-ancient art of DS marketing.

Now go! It is time for the student to become the master. And remember, always bow at the hips and maintain eye contact.

Love always,
Team DealerSocket

WHAT'S NEXT?

Coming up next ...
Life (now that's deep).

[REVIEW THE ONBOARDING PROCESS](#)

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YAY



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