onPhase

Dealer Guide:

Buying Technology for Your Dealership

A practical, no-pressure guide to help your team evaluate, select, and go live with confidence, without surprises.

How to Use This Guide

Most dealerships buy technology the same way they did a decade ago: a vendor calls, a demo gets scheduled, someone signs, and the real questions get asked after go-live. The result is tools that don't fit the workflow, integrations that don't work the way the sales deck showed, and teams that never fully adopt what was bought.

The right technology fixes that. The wrong technology makes it worse.

This guide walks your team through a structured 45-day evaluation, from defining the problem to going live, whether you're running one location or fifteen. Work through each phase in order. Check items off as you go. Share it with everyone involved so nobody gets surprised.

Designate one internal Vendor Champion on Day 1. This person owns the project, coordinates across departments and rooftops, and is the main point of contact with any vendor. Without one, evaluations stall.

Who to Involve

Before you evaluate anything, get the right people in the room. Missing a key stakeholder early almost always causes delays, rework, or failed adoption later.

Role	Why They're Needed	When to Involve
Dealer Owner / Principal	Final decision-maker. Approves budget, signs contracts, and sets the tone for change management across the group.	Day 1
Controller / CFO	Owns the budget, reviews ROI, and pressure-tests vendor claims about time savings and error reduction.	Day 1
IT Contact (internal or VAR)	Reviews security posture, integration feasibility with your DMS, and network requirements. Critical before any demo.	By Day 10
Team Lead	The people who live inside the process every day. Their feedback on demos is irreplaceable, and their buy-in determines adoption.	By Day 10
Parts/Service Manager	Manages the highest-volume operational workflows in the building. Their instincts on usability and day-to-day fit will make or break adoption.	By Day 10
Office Manager / Admin Lead	Manages workflow coordination across departments and locations. Often the bridge between business needs and ops.	By Day 15
Vendor Champion (internal)	Drives the project forward internally. Set this person up for success early or the evaluation will stall.	Day 1. Designate early.

PHASE 1 | Discovery & Scoping

Days 1 to 10

Your goal here is to get specific about the problem before you evaluate any solution. The most common mistake dealers make is jumping to demos before they know what they actually need, then the sales cycle takes over.

Internal Needs Assessment

- Start with your current reality. Be honest about where the friction lives.
- Write down the specific problem(s) you want the technology to solve, in plain language, not vendor language.
- Map your current process end-to-end: from when the problem starts to when it gets resolved today, and where it breaks down along the way.
- Estimate the cost of your current process: hours per week, errors that have to be fixed, delays that cost you money or relationships, and what that adds up to annually.
- Ask the people who live inside the process every day: Where do you spend the most time? Where do things go wrong? What slows you down most?
- Identify how many locations are affected and whether processes are consistent across locations. They usually are not.
- Confirm the Dealer Principal is aligned on the problem and open to a solution before you go further.
- Set a rough budget range. This will focus your shortlist quickly.

Where technology buying goes wrong in dealerships:

Buying before the problem is clearly defined. Choosing a tool that works for the demo but doesn't fit the actual workflow. Skipping the DMS integration question until after the contract is signed. Not involving the people who will use it daily until go-live. And underestimating how much change management a new system requires across multiple rooftops. Any of these can turn a good product into a failed implementation.

Vendor Shortlisting

- Cast a reasonable net, then narrow quickly. You don't need to evaluate five vendors. You need to evaluate the right ones.
- Ask your DMS provider which vendors they partner with or certify for this category of tool. A certified integration is a meaningful filter. It tells you the vendor has done the hard work of connecting to your system correctly, not just building a workaround.
- Ask other dealers in your network who they use and what they'd do differently.
- Confirm each vendor has direct experience with dealerships in your segment, not just generic experience with other industries.
- Confirm each vendor has a certified or documented integration with your DMS, not a workaround or data export.
- Schedule 30 to 60 minute intro calls to understand the approach before committing to a full demo.
- Ask each vendor: How many dealerships like ours do you work with, and can I talk to some of them?
- Ask each vendor: What does your DMS integration actually do? Which fields sync, how often, and what happens when it breaks?

Brief Your IT Contact

- Walk IT through what you're evaluating and why. Give them context, not just a task.
- Have IT document your current systems: DMS version and configuration, existing software systems, any integrations or customizations.
- Ask IT: Are there any known restrictions on cloud-based or third-party software tools in our environment?
- Bring in your VAR or DMS consultant if your setup has customizations, unique configurations, or multi-location complexity
- Ask IT to flag any security requirements upfront so vendors can address them during demos, not after.

PHASE 2 | Evaluation

Days 11 to 30

This is where you go deep. You have narrowed your list, so now evaluate each vendor rigorously. The goal is to get past the pitch and into the actual product.

Product Demo Checklist

Ask every vendor to demo using your actual data and your actual workflow, not a generic presentation. If they cannot do that, that is itself a signal.

- Watch a live demo of the specific problem you're trying to solve, not a feature tour.
- Ask them to show a complete workflow end-to-end, from the moment a task enters the system through to resolution, not just the steps that look good in a demo.
- Ask to see how the tool interacts with your DMS in a live environment. Where does data flow from, and where does it land? This is where most tools struggle in a dealership context.
- Ask: What happens when the system can't handle an exception automatically? Who touches it, how, and how long does it take? Exceptions are where most dealership workflows break down. Don't let a vendor skip this question.
- Ask: What does Day 1 look like for my team? Day 30? Six months in?
- Ask: What is your training process? Who delivers it, how long does it take, and is it available on-demand for new hires?
- Ask: Have you worked with dealerships that run multiple locations, multiple DMS configurations, or both? Ask them to show you how their tool handles that complexity.
- Ask: When something breaks, what's your support process and response time?
- Have the people who will use this tool every day attend at least one demo. Their instincts about usability are more valuable than yours.

Ask vendors to demo using real scenarios from your operation: your messiest workflows, your edge cases, your exceptions. How a tool handles the hard stuff tells you far more than how it handles the easy stuff. If a vendor only wants to show you the clean path, that's a signal.

Integration & Security Review

Your DMS is the center of your operation. Any technology you add needs to work with it, not around it.

- Confirm the vendor has a certified integration with your DMS and ask to see the documentation
- Ask: What data syncs between your platform and our DMS, and in which direction? Get specific about which fields, how often, and what happens when the sync fails.
- Ask: Is the sync bidirectional and real-time, or is it batch/manual?
- Ask: What happens to our data if the integration breaks or we cancel the contract?
- Ask the vendor for their security documentation: SOC 2 compliance, data encryption, access controls
- Ask: Where is our data stored and who has access to it?
- Have IT review integration requirements and confirm feasibility with your specific DMS configuration
- Ask: Does this require any hardware changes, firewall updates, or on-site installation?
- Ask: If we add a location, what does that integration look like? Does each location get its own configuration, or is it managed centrally? You should confirm this works before signing, not after.

Reference Calls

Talk to dealers who use the product, not just the ones the vendor handpicks if you can help it. Ask your DMS rep or dealer network for names.

- Ask for a reference that aligns with your dealership OEM, DMS, or processing volumes.
- Ask references: What surprised you during implementation, good or bad?
- Ask references: How long before you saw real value? What did the first 90 days actually look like?
- Ask references: How does the tool handle situations it can't process automatically, and how often does your team have to step in?
- Ask references: How has support been when things go wrong?
- Ask references: How did you manage change with your team and what made adoption easier or harder?
- Ask references: Would you buy again, and is there anything you wish you'd known before you signed?

PHASE 3 | Decision & Go-Live Prep

Days 31 to 45

You have selected your finalist. Now make sure the partnership is set up for success before you sign, not after.

Contract Review

Have your Controller or an advisor review before signing. Focus on total cost, not just the headline number.

- Confirm the contract term length and payment schedule.
- Confirm exactly what is included in the base price vs. what costs extra (integrations, additional users, training, support tiers).
- Review the auto-renewal policy and confirm you have at least a 30-day cancellation notice window.
- Confirm implementation and onboarding fees are clearly itemized. Vague onboarding costs are common.
- Confirm the contract accommodates your growth: additional rooftops and users. That shouldn't trigger surprise fees.
- Ask: What happens to pricing at renewal and is there a cap on annual increases?

Implementation Planning

A great product with a poor implementation is a failed investment. Get the plan in writing before go-live.

- Get a written implementation plan from the vendor with milestones and owner for each.
- Confirm who the vendor's implementation lead will be. The person who sold you should not disappear at signing.
- Assign your internal Vendor Champion as the primary day-to-day contact.
- Confirm training dates, format (on-site, virtual, recorded), and who on your team needs to be involved.
- Confirm which DMS data needs to be configured before go-live, and who is responsible for that setup.
- Identify a 30-day hypercare window post go-live: more frequent check-ins, faster escalation, clear support contact.

Define What Success Looks Like

Agree on outcomes before go-live, not six months later when you're trying to justify the investment.

- Define 2 to 3 measurable outcomes you expect within the first 120 days of go-live.
- Agree with the vendor in writing on what 'successful implementation' means for your operation.
- Schedule a 30-day and 90-day check-in with the vendor after go-live and put both on the calendar now.

Red Flags to Watch For

If you run into any of the following during your evaluation, slow down and dig deeper before moving forward.

They cannot provide references from dealerships like yours.

Dealership operations are specific from multi-rooftop approvals, DMS-dependent workflows, OEM relationships, and back-office processes that don't exist in other industries. A vendor who has never worked in your world will learn at your expense. Push for references from dealers who match your size and segment, not case studies from generic enterprise customers.

They handle the easy cases and call it done.

Generic tools handle the straightforward cases well. What they struggle with is dealership complexity: multi-rooftop approval chains, DMS-dependent workflows, OEM relationships, and the edge cases that don't fit a standard template. In a dealership, the edge cases are where the real work lives. Ask specifically what happens when the tool hits something it can't handle automatically, and how often that occurs.

They pressure you to sign quickly.

Legitimate vendors understand that buying technology is a significant decision requiring proper evaluation. High-pressure tactics like expiring pricing are a sign of poor confidence in a fair comparison. A vendor confident in their product is not afraid of scrutiny.

The right team wasn't included in the demo.

If the people who will use the software every day don't get a voice in the evaluation, adoption after go-live will be a struggle. Their concerns about usability are often right, and ignoring them is one of the most common reasons implementations fail.

Hidden fees for integrations, training, or additional users.

Always ask: what's included in the base price, what costs extra, and what does pricing look like if we add a rooftop or hire two new staff? If they can't answer clearly, get it in writing before you sign.

45-Day Evaluation at a Glance

Days	Phase	Focus	Key Outputs
1 to 10	**Discovery**	Define the problem, map current process, shortlist vendors	Documented needs, budget range, shortlist of 2 to 3 vendors, IT briefed, Vendor Champion named
11 to 20	**Demos**	Live product demos with your data and your team	Demo checklist completed, department managers attended, initial ranking of vendors
21 to 30	**Deep Dive**	Security review, DMS integration check, reference calls	IT sign-off on integration, 2 or more reference calls completed, finalist selected
31 to 38	**Decision**	Contract review, pricing clarity, implementation planning	Contract terms confirmed, implementation plan in writing, success metrics defined
39 to 45	**Sign & Launch Prep**	Sign contract, set go-live date, schedule training	Kickoff scheduled, training dates confirmed, go-live date on the calendar

> We work with dealerships every day to help their finance teams operate leaner, close faster, and scale without adding headcount. If you're working through an technology evaluation and want a sounding board, from people who know this world, we'd love to be part of the conversation.

Questions? Reach us at **info@onphase.com | onphase.com**