



KELLEY

2026 INTERNS | DIGITAL SALES + CRM TRAINING



TRADITIONAL DEALERSHIP SALES

- ▶ Up until the last few years, the current automotive retail and distribution model has remained largely unchanged since the 1980s
- ▶ This has been poor for both consumers, and manufacturers
 - ▶ For consumers, buying a car can be a slow and fragmented process with lengthy paperwork involved
 - ▶ For manufacturers, multiple stakeholders contributing to the current auto value chain erodes margins and results in a disjointed approach to selling
- ▶ This has led to a growing disconnect in the buy-seller relationship.

CUSTOMER JOURNEY



Discovery



Consideration



Purchase & Finance



Delivery



Ownership



Service



Repurchase

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DIGITAL SALES

- ▶ Customers Expectation - A **SEAMLESS** Experience
 - Amazon & COVID changed the expectations
 - The dealerships seeing the strongest performance are those leveraging CRM platforms, AI-driven engagement, predictive analytics, and unified customer data to reduce friction and increase conversion rates.
- ▶ What Does that Mean?
 - Move from siloed systems toward connected ecosystems where CRM, inventory, marketing, desking, and analytics platforms all communicate together.
 - Leverage customer behavior data and automation to prioritize high-intent shoppers, personalize follow-up, improve response times, and maximize retention opportunities.

INDSUTRY SHIFT

- ▶ Digital sales in the automotive dealership industry have evolved from simply generating internet leads into creating a fully connected, omnichannel customer journey.
- ▶ Today's consumers:
 - ▶ Browse inventory
 - ▶ Value trades
 - ▶ Structure payments
 - ▶ Communicate via text/email/chat,
 - ▶ Schedule appointments

DIGITAL SALES

- ▶ KAG is effectively building a modern dealership intelligence platform that combines:
 - CRM engagement data from DriveCentric
 - Enterprise analytics through ATLAS (Power BI)
 - Operational KPI tracking
 - Lead source attribution
 - Sales activity monitoring
 - Customer lifecycle visibility
 - Future CDK integration for full dealership operational analytics

DIGITAL SALES

- ▶ The practical use case for KAG is not just “selling cars online,” but rather creating a data-driven retail ecosystem where:
 - Sales teams can prioritize the highest-converting opportunities
 - Managers gain transparency into activity and accountability
 - Marketing can optimize spend based on real attribution
 - Leadership can identify trends across rooftops in near real-time
 - Customers receive faster, more personalized engagement

DIGITAL SALES STRATEGIES

- ▶ Faster lead response times
- ▶ Personalized customer communication
- ▶ Activity and accountability tracking
- ▶ Data-driven sales management
- ▶ Integration between CRM, marketing, and operational systems

DIGITAL SALES STRATEGIES

- ▶ ATLAS + DriveCentric strategy creates a centralized dealership intelligence ecosystem
- ▶ Real-time visibility into:
 - Leads
 - Appointments
 - Sales activities
 - Conversion performance
 - Store and employee KPIs
- ▶ Future CDK integration expands visibility into full dealership operations

WHY DIGITAL?

95%

- ▶ of vehicle buyers use digital as a source of information. In fact, **2x** as many start their research online versus at a dealer

70+%

- ▶ Of shoppers say video has helped them learn more about an auto product they intend to buy

14hrs

- ▶ Car Buyers spend an average of 14 hours researching online

LEAD ATTRIBUTION

- ▶ Dealership attribution is the process of identifying which advertising sources, campaigns, and customer touchpoints actually contribute to vehicle sales, service revenue, and customer engagement.
- ▶ Dealerships invest heavily across:
 - ▶ Google
 - ▶ Meta
 - ▶ OEM programs
 - ▶ Third-party lead providers
 - ▶ Traditional media
 - ▶ CRM campaigns
 - ▶ Retention marketing
- ▶ Attribution becomes critical to understanding ROI and optimizing spend.

WHY ATTRIBUTION MATTERS?

- ▶ Customers interact with multiple touchpoints before purchasing
- ▶ Traditional reporting often over-credits the final lead source
- ▶ Dealerships need visibility into the entire customer journey

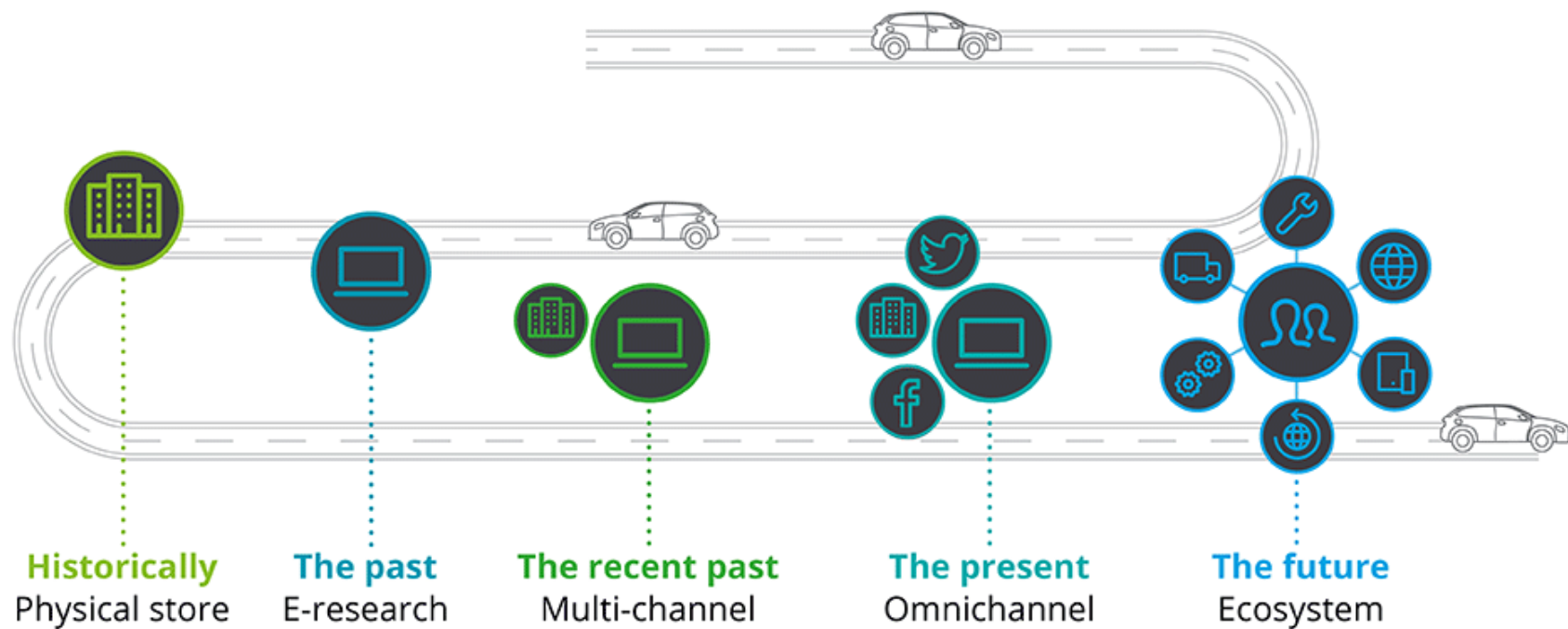
CORE ATTRIBUTION NEEDS

- ▶ Connect ad spend to actual vehicle sales and profitability
- ▶ Measure lead quality – not just lead volume
- ▶ Understand which campaigns drive appointments and deliveries
- ▶ Eliminate inflated or duplicate vendor reporting
- ▶ Improve marketing ROI and operational decision-making

KAG OPPORTUNITY

- ▶ Centralize CRM, marketing, and operational data within ATLAS
- ▶ Measure true ROI by:
 - ▶ Vendor
 - ▶ Campaign
 - ▶ Source
 - ▶ Rooftop
- ▶ Identify highest-performing marketing channels and sales processes
- ▶ Build predictive, behavior-driven marketing strategies over time

CUSTOMER JOURNEY



BREAK

▶ 10 Minute Break

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SALES LEADS

- ▶ Up
 - ▶ "Unqualified Prospect "
 - ▶ Sources
 - ▶ Showroom Ups
 - ▶ Phone Ups
 - ▶ Internet Ups

SOURCES & SUB-SOURCES

- ▶ Source
 - ▶ General Description of the origin of the lead
 - ▶ Showroom, Phone, Internet
- ▶ Sub-Source
 - ▶ Specific Description of the origin of the lead
 - ▶ Examples

SHOWROOM UPS

- ▶ Showroom Ups originate at the dealership for customers who did not start the sales process with a phone call or an online form submission
- ▶ AKA "Fresh Up" or "Lot Up"
- ▶ Sub-Sources
 - ▶ Drive By
 - ▶ Personal Networking
 - ▶ Previous Customer
 - ▶ Referral
 - ▶ Service Department

PHONE UPS

- ▶ Phone Ups originate when the prospect contacts Kelley Automotive Group utilizing one of dozens of our posted telephone numbers
- ▶ Phone ups can route through the BDC or be a direct call to an SLC
- ▶ Sub-Sources
 - ▶ 3rd Party Sites - AutoTrader, Autolist, CarGurus, Carfax, Cars.com, Dealer Rater, KBB
 - ▶ Dealer Site
 - ▶ DriveKelley.com
 - ▶ Inbound
 - ▶ Personal Networking
 - ▶ Previous Customer
 - ▶ Referral
 - ▶ Service Department
- ▶ Example

INTERNET UPS

- ▶ Internet leads originate when a prospect completes an online form submission with the intention of gathering more information on a vehicle and/or beginning the online buying process
- ▶ The prospect's contact information and vehicle of interest (VOI) is captured and forwarded to the Group's CRM utilizing a lead parsing address
- ▶ The CRM digests that information, allocates the lead to the appropriate dealership, assigns a BDR and SLC, and creates a channel of engagement between the prospect and the sales team to continue the sales process

INTERNET UPS - SRPs & VDPs

► SRPs

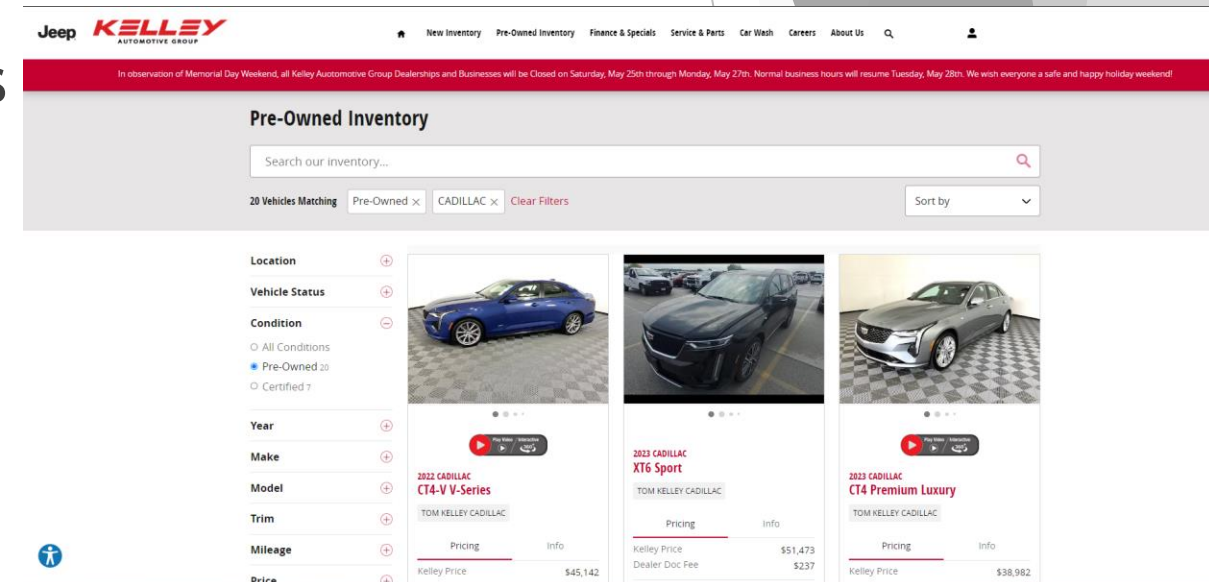
- Vehicle Search Result Page Impressions (SRPs): Impression activity for vehicles that appear within used and new car search results pages. The search results page can be found anytime a shopper searches for a used or new vehicle.

► VDPs

- Page views of a vehicle's detail page. The VDP can be accessed from the search result page by clicking on a vehicle.

INTERNET UPS - SRPs

- ▶ Impressions are recorded when a vehicle appears within a search results page
- ▶ SRP impressions are only logged when a vehicle is presented to the shopper
- ▶ For example, if a used or new vehicle search yields three pages of results and the user only views the first SRP, vehicles that appeared on pages two and three will NOT receive SRP impressions



INTERNET UPS - VDPs

- ▶ Impressions are recorded when a shopper arrives on a VDP
- ▶ If that same shopper returns to that VDP multiple times, an additional VDP is recorded each time
- ▶ Additional impressions are NOT generated when a shopper navigates within the VDP
- ▶ For example, if a shopper is on a VDP and clicks the photos tab then back to the main information tab, it only registers a single VDP impression.

The screenshot displays the Kelley Automotive Group website interface. At the top, the Kelley Automotive Group logo is visible alongside navigation links for New Inventory, Pre-Owned Inventory, Finance & Specials, Service & Parts, Car Wash, Careers, and About Us. A red banner below the navigation bar states: "In observation of Memorial Day Weekend, all Kelley Automotive Group Dealerships and Businesses will be Closed on Saturday, May 25th through Monday, May 27th. Normal business hours will resume Tuesday, May 28th. We wish everyone a safe and happy holiday weekend!"

The main content area features a gallery of three photos of a blue 2022 Cadillac CT4-V V-Series. Below the photos, the vehicle's name "Certified Pre-Owned 2022 CADILLAC CT4-V V-Series" is displayed, along with a note that it has "72 views in the past 7 days". A location tag indicates it is "Located at TOM KELLEY CADILLAC", with links for "Location Details" and "Website".

To the right of the vehicle details, a price breakdown is shown:

Item	Price
Kelley Price	\$45,142
Dealer Doc Fee	\$237
Internet Price	\$45,379

Below the price breakdown, a disclaimer states: "Website errors may occur. All offers and pricing details should be confirmed for accuracy with the dealership." Action buttons for "Check Availability", "Build My Deal", "Ask", and "Drive" are provided. At the bottom, a contact number is listed: "We're here to help: (260) 264-2837".

At the bottom of the page, the Kelley Automotive Group logo is prominently displayed.

INTERNET UPS - Internet Ups vs. Campaigns

► Definitions

- Internet Ups - User-generated from online form submission
- Campaigns - Generated by OEMs, Events, and 3rd Parties

► KAG intentionally separates Internet Ups from Campaign Ups

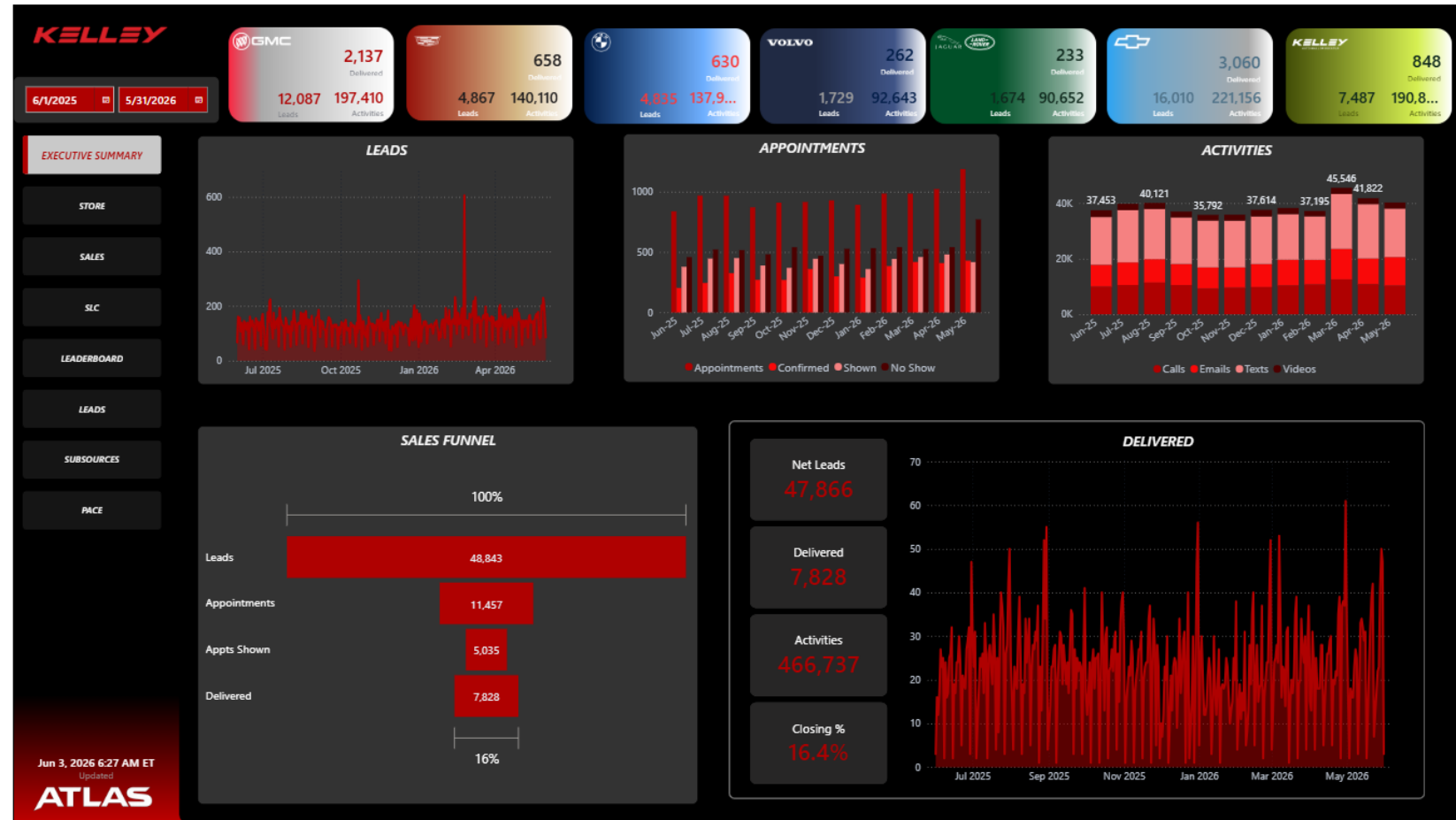
- Marketing Budgets
- Accurate Data
- Proper Handling of Leads

LEAD SUMMARY

► ATLAS

► KAG Monthly Leads

- Phone - 700
- Showroom - 750
- Internet - 2,300
- Campaign - 520
- Total - 4,270/ Month



LEAD SUMMARY - Phone Ups

► Lead Volume (Average/Month)

- BMW - 60
- Buick GMC - 175
- Cadillac - 75
- Chevrolet - 200
- Decatur - 125
- JLR - 25
- Volvo - 25
- **All KAG** ~ 700+ /Month

LEAD SUMMARY - Showroom Ups

► Lead Volume (Average/Month)

- BMW - 60
- Buick GMC - 175
- Cadillac - 60
- Chevrolet - 300
- Decatur - 85
- JLR - 25
- Volvo - 30
- **All KAG** ~ 750+ /Month

LEAD SUMMARY - Internet Ups

- ▶ 230+ Internet Lead Sources across all KAG
- ▶ Lead Volume (Average/Month)
 - BMW - 215
 - Buick GMC - 575
 - Cadillac - 250
 - Chevrolet - 635
 - Decatur - 425
 - JLR - 90
 - Volvo - 90
 - **All KAG** ~ 2,300

LEAD SUMMARY - Campaign Ups

► Lead Volume (Average/Month)

- BMW - 45
- Buick GMC - 120
- Cadillac - 15
- Chevrolet - 300
- Decatur - 40
- **All KAG** ~ 520+ /Month

WHAT IS CRM?

- ▶ Customer relationship management (CRM) is a system for managing KAG's interactions with current and potential customers
- ▶ The goal is simple: improve relationships to grow business
- ▶ CRM technology helps KAG stay connected to customers, streamline processes, and improve profitability
- ▶ A CRM System is software that helps track each interaction our organization has with a prospect or customer. That includes sales engagements, service interactions, marketing emails, and more.

WHY CRM? - Single Source of Truth

- ▶ Our customers have hundreds of engagement points across several different channels
- ▶ Our CRM provides the entire Kelley team with a clear, unified customer profile — a single, simple, dashboard with a customer's purchase history, sales status, service history, and more. This information can be invaluable, especially since 70% of customers expect every representative they contact to know their purchase and issue history.
- ▶ Whether they've previously reached out via phone, chat, email, or social media, a single source of truth ensures everyone at Kelley can provide the expected level of service.

WHY CRM? - Cost Savings

- ▶ Having a single source of truth doesn't just benefit customers. It keeps Kelley Automotive Group organized and focused on revenue-driving activities. Sales teams generate a flood of data while talking to prospects, meeting customers, and collecting valuable information.
- ▶ If all that information gets stored in handwritten notes, laptops, or inside the heads of salespeople, there can be serious cost implications. Details can get lost, action items aren't followed up on promptly, and customers get prioritized based on guesswork rather than data.
- ▶ And if someone leaves the group, unless their contacts and notes are saved in a CRM, that information — and business — may disappear along with them.

WHY CRM? - Collaboration

- ▶ A CRM brings all of our teams and departments together, sharing information that makes everyone's job easier.
- ▶ For example, throughout the course of the sales process, prospects will interact with BDRs, SLCs, Sales Managers, F&I, & Leadership.
- ▶ CRM helps manage lead customer journeys with a data-driven approach.
- ▶ CRM provides visibility into every opportunity or lead, showing you a clear path from inquiries to sales and from sales to post-sales lifecycle.

DRIVECENTRIC

- ▶ DriveCentric is our new Customer Relationship Management (CRM) software that simplifies the sales engagement process with an incredibly user-friendly interface, improved visibility to sales opportunities, and integrations to inventory and desking.
- ▶ Implemented across KAG on July 2023

BREAK

▶ 10 Minute Break

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DRIVECENTRIC

Let's Take a Look!

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BREAK

▶ 10 Minute Break

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DRIVECENTRIC

Let's Get In!

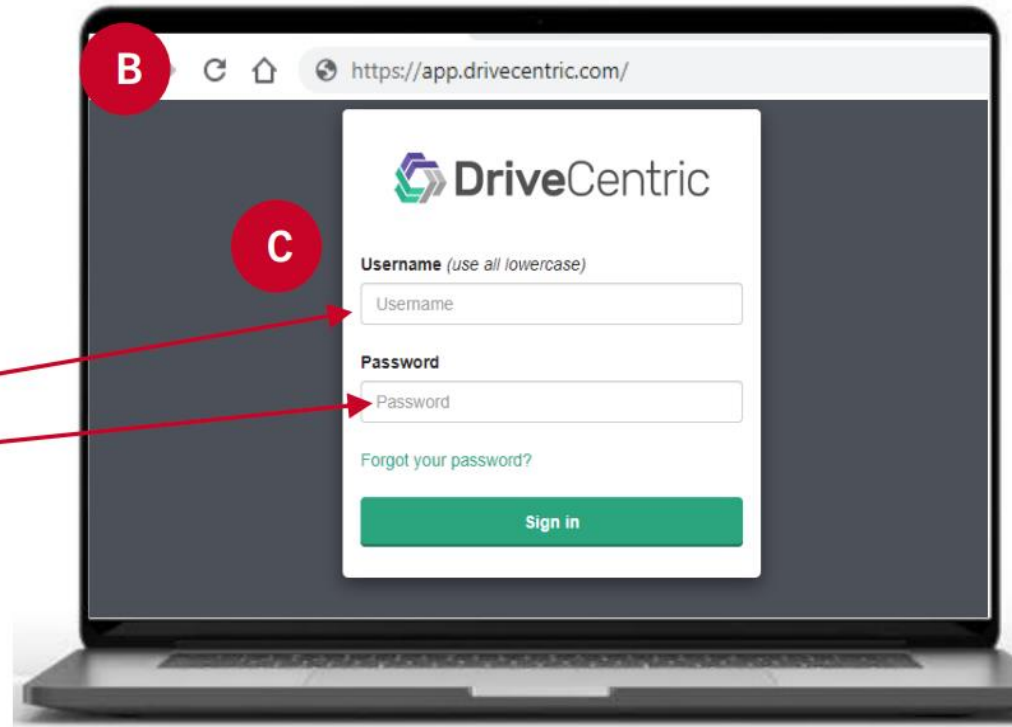
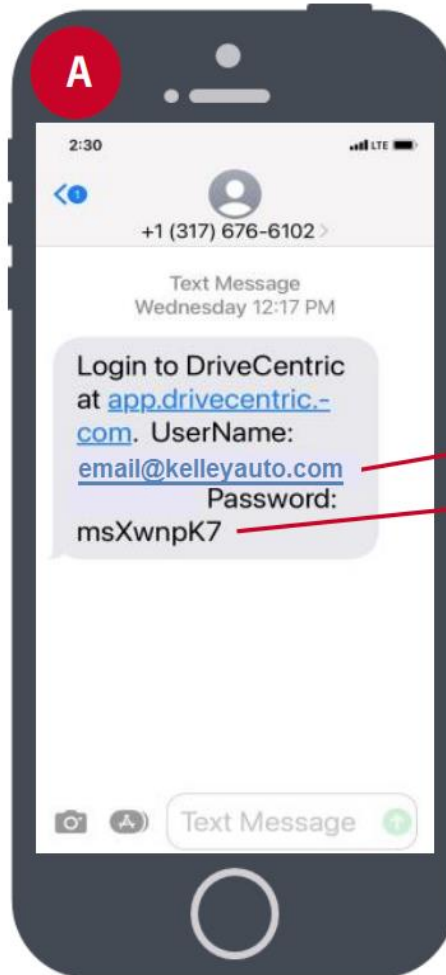
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DRIVECENTRIC - Login

- ▶ A DriveCentric login is created for you based on your company email address and cellphone number
- ▶ A text message will be sent to your cellphone with login information
- ▶ Using a desktop computer use this [link](#) to get to the DriveCentric login screen.
- ▶ **NOTE:** Google Chrome is required as your web browser

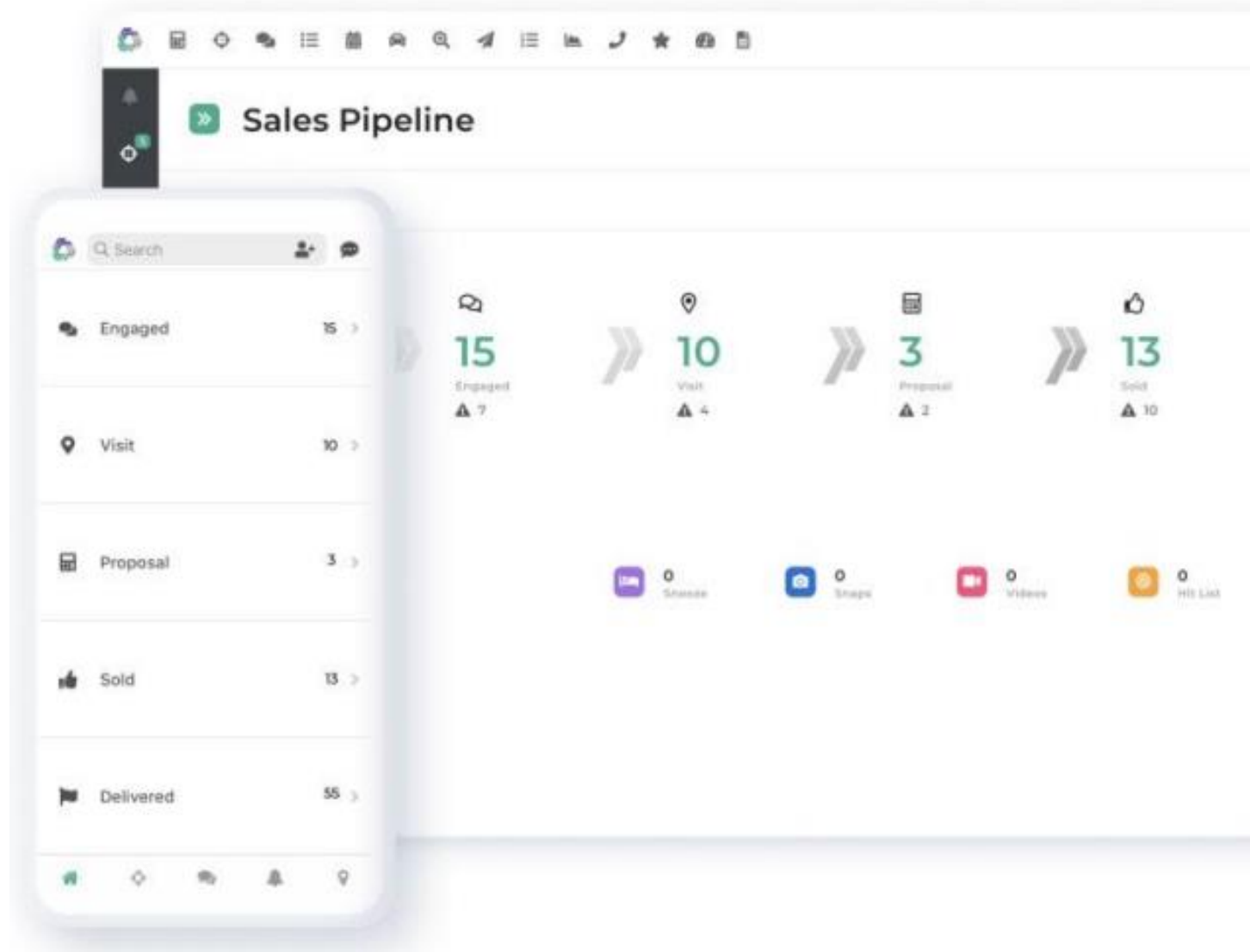
DRIVECENTRIC - Login

- Enter your username (KAG email address) and temp password from the text



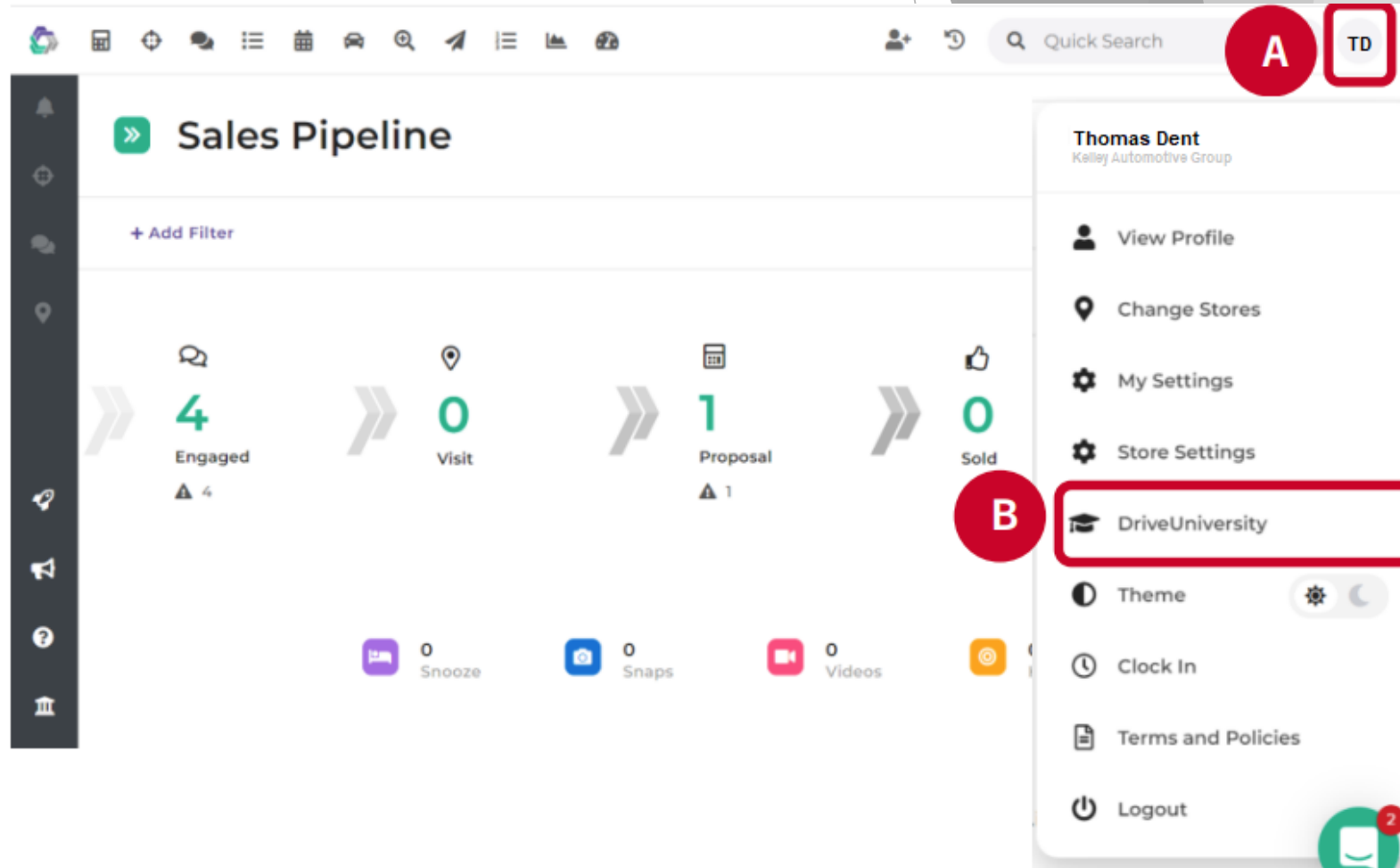
DRIVECENTRIC - App

- ▶ To find the mobile app, please search "DriveCentric" in the app or play store



DRIVECENTRIC - DriveUniversity

- ▶ To access the DriveCentric Training:
 - A. In the upper right corner click on your initial's icon
 - B. Select DriveUniversity
 - C. Complete the required courses under the “My Trainings” tab



DRIVECENTRIC

DriveUniversity - 60 Minutes

DRIVECENTRIC - DriveUniversity

- ▶ Level 1: DriveCentric Basics (45 Minutes)
- ▶ Level 2: Advanced Skills (60 Minutes)
- ▶ Level 3: Management Focus (75 Minutes)

DRIVECENTRIC

Skill Practice

DRIVECENTRIC - DriveUniversity

1. Add a Test Deal
 - Create yourself as a customer
 - Add a vehicle of interest and trade
2. Test Channels
 - Send Yourself an email, text, and video
3. Schedule Future Tasks
 - Task (Email, Text, Phone Call)
 - Appointment
 - Reminder

DRIVECENTRIC

Management Overview

INTERNET UPS - DriveCentric

- ▶ Lead Assignment
 - ▶ Check for Possible Duplicates
 - ▶ Check for Deal Retention
 - ▶ Assign lead based on the ADF/XML - "Email" line of the Vendor Contact section
 - ▶ Check for Assignment Rule(s)
 - ▶ Global Up For Grabs

THANK YOU

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